

AGILE-TEAM™ : THE FLEXIBLE AGILE PROJECT MANAGEMENT SOLUTION



agile-team™

User Manual

Copyright (c) 2004-2010

Agile-Team APS

H. J. Holst Vej 3C-5C

DK-2605 Brøndby, Denmark

<http://www.agile-team.com/>

Email sales@agile-team.com

Tel. +45 36 36 00 00

Table of Contents

Introduction	6
Agile-Team Basics	7
Work Breakdown Structure	7
Projects	8
WorkItems.....	9
Activities.....	9
Resources	10
Time Reports	10
Versions.....	10
Phases	11
Parts	12
User-defined Dimensions.....	12
Planning	12
Working with Agile-Team	14
Tree Operations	16
Drag-n-drop.....	16
Inheritance	16
Project Management	16
Active	17
Project Properties Dialog	17
Project View	27
WorkItem Explorer.....	29
Planned	34
Used	34
VersionAppear	34
VersionDone	34
WBS No	34
WI Count	34
WIKind	34
WorkItem	34

WorkItem Dialog and WorkItem Pane	38
Resource Management	56
Agile-Team Logins	58
Resource Property Dialog	58
Resource View.....	66
Calendar Management	67
Reporting the Time	70
Permissions for Report Time	71
Last Date for Changes to Time Reports	71
What Activities Are Available for Time Reporting	72
TimeReport Daily View.....	76
TimeReport Monthly View	79
Version Management	84
Software Version Numbering.....	85
Source Code Branching	86
Version Constraints Enforced in Agile-Team	87
Version Dimension	87
Connecting WorkItems to Versions	94
Version Filters	98
How to Manage Version Handling for a Team.....	101
Working with Dimensions	102
Dimension Management.....	102
Dimension View	106
Dimension Item Property Dialog.....	107
Predefined Dimensions: Parts and Phases.....	110
Connecting WBS Items to Dimensions.....	115
Planning	117
How to Create a Plan?.....	118
How will Agile-Team calculate a plan?.....	118
The Resource Allocation Pane	119
Resource Allocation Samples	122
The Basis for Planning: WorkItems with Estimates	125

Using Phases for Planning	125
Using EarlyStart and LateFinish for Planning	126
Using Predecessors for Planning.....	127
How to View Planning Results?.....	127
Gantt Pane Options.....	134
Gantt View Samples	143
How to Spot Planning Problems?.....	144
Permissions and Roles	144
Permissions for Global Operations	145
Permissions for Dimensions Access	147
Search and Filtering	150
Search for WorkItems	150
Using Filters.....	152
WorkItem Browser.....	162
Printing and Paper Reports	166
Printing System	166
Page Setup dialog.....	166
Print and Print Preview	166
Printing Gantt diagram.....	171
Paper Reports.....	171
Project WorkItems Report	173
Workspace Customization	175
WorkItem Explorer Named Views.....	175
View Customization	177
View Organizing	184
WorkItem Dialog and WorkItem Pane Layouts	186
Layout Management.....	187
Import of Layouts.....	188
Layout Design.....	189
Saving of Layout	191
Undo or Redo Changes	192
Using of Layouts.....	193

Local User Options 194

Visibility of Tabs.....198

Introduction

Agile-Team is a project management, issue tracking and planning tool. It does also comes with a Customer Portal(Helpdesk). Agile-Team has a strong focus on detailed modeling of project structure and on managing time for the project.

Project management, such as those provided by Agile-Team, follows the widely used PMBOK¹ recommendations. All projects handled by Agile-Team have a strict hierarchical structure from the fundamental activities all the way up to Projects and group of Projects. This results in a task-oriented family tree, known as WBS (Work Breakdown Structure)².

Time handling is one of the powerful and unique features of the Agile-Team. It is obvious that time is used almost everywhere in the Project. It begins from time estimation of each elementary activity and setting of time constraints for projects, group or phases and it continues with detailed time reports, resulting in the building of the project plan.

Agile-Team system is independent of a project life-cycle model applied to the Project. The process can be modeled separately for each Project no matter whether a traditional methodology, such as waterfall or spiral; or a modern Agile methodology, such as eXtreme Programming or SCRUM, is used.

Agile-Team is optimized for creative work. It is easy to make changes to a project with drag and drop, changing estimates, adding new ideas – all in a controlled and manageable framework with an explicit workflow.

Agile-Team has been developed by programmers for programmers. While it can be used in any project-oriented business, like construction or media, its primary field is to support of software development, shipping and support processes. Software products are developed in versions. So, version management facility that helps maintaining product branches and versions in industry standard way is one of significant features of Agile-Team.

Another Agile-Team feature is the ability to have an unlimited set of user-defined dimensions. In comparison with distinguished competitors, Agile-Team doesn't offer custom fields for WBS, Phases, etc. With multiple dimensions, it provides an ability to have multi-aspect views at the working process.

Of course, Agile-Team also offers fully customizable workspace, powerful filtering and search, presentation quality reports, and much more.

The Professional Edition of Agile-Team includes a ready to use Customer Portal. Customers can report incidents, communicate with product supporters, track for updates and access a product Knowledge Base. On the other side, the product supporters can register incidents as Agile-Team WorkItems right from within the portal.

¹ PMBOK (Project Management Body of Knowledge) - internationally recognized standard, that provides the fundamentals of project management as they apply to a wide range of projects. See: en.wikipedia.org/wiki/Pmbok.

² The Wideman Comparative Glossary of Project Management Terms. // <http://www.maxwideman.com/index.htm>

Agile-Team developers are happy to present you our product.

Agile-Team Basics

The main logical elements of Agile-Team are:

- Projects
- WorkItems
- Activities
- Resources
- Time Reports
- Parts
- Phases
- User-defined Dimensions

All these Agile-Team elements are heavily related, i.e. they have references to each other.

Projects, WorkItems and Activities form a hierarchical task-oriented tree known as a Work Breakdown Structure (WBS). Parts, Phases, and user-defined Dimensions are also organized in hierarchies.

Work Breakdown Structure

Enterprises perform work. Usually work consists of several projects. Projects are endeavors undertaken to create products or services.

Projects are:

- performed by employees;
- constrained by limited resources;
- planned;
- executed;
- controlled.

Each Project has a definite beginning and a definite end. Projects are undertaken at all levels of an enterprise. Projects are the means by which an enterprise business strategy is implemented. Therefore, the planning and management of the enterprise business is planning and management of the enterprise project portfolio. The basis for effective project management is proper definition and description of what is or what is not to be included into the project. This is usually called a *project scope definition*. The project scope definition is implemented by subdividing the major project deliverables into smaller components that are easily manageable. A good project scope definition is critical to a successful project management. "When there is poor scope definition, final project costs can be expected to be higher,

because of the inevitable changes, which disrupt project rhythm, cause rework, increase project time, and lower the productivity and morale of the workforce "³.

A standard result of the project scope definition is the *Work Breakdown Structure* (WBS) of the project. The project WBS is a deliverable-oriented grouping of project works that organizes and defines the total work scope of the project. Each descending level represents an increasingly detailed definition of the project work⁴. You can think about WBS as being a basic project diagram that documents and describes all the works that must be done to complete the project. The WBS forms the basis for costing, scheduling, and work responsibility.

At the highest level of the project WBS; is the Project itself. Intermediate levels of the project WBS are sub-projects. And at the lowest level are WorkItems.

WorkItems are the main entities in Agile-Team. Usually a WorkItem is a minimal separate element of work, which should be performed during execution of the project. Each WorkItem represents some job that must be done. Each WorkItem has a description, time estimations, and persons (Resources) that should perform the job. WorkItems can normally be called tasks.

Each WorkItem consists of several activities like:

- Analysis
- Implementation,
- Documentation,
- Testing
- etc.

Projects

A *Project* is a set of activities, which should be executed to reach the Project goal. Projects are the main entity of project management. Each Project usually has a budget. Sometimes there is a contract for a Project. A Project is the basis of periodic reporting, planning, etc. Usually a person is assigned to be the manager of a Project, and there is a set of persons assigned to perform the activities in the Project.

Agile-Team handles Projects and WorkItems as one big tree, which can organize Projects in groups and divide Projects into sub-Projects. Projects and sub-Projects are handled equally and have the same properties.

Each Project in Agile-Team has its name, a description, and some associated WorkItems. A Project can have an explicitly assigned manager, or will inherit the manager from the parent Project.

Agile-Team allows assigning some time constraints for the Project. These constraints include:

- Phase

³ Scope Definition and Control. Publication 6-2, 1986 (July), Austin, Tex., Construction Industry Institute, p. 45.

⁴ A Guide to Project Management Body of Knowledge (PMBOK Guide). 2000, Project Management Institute, Newtown Square, Pennsylvania, USA.

- Earliest Start
- Latest Finish
- Budget Time

Time constraints are used by the Planning facility.

WorkItems

As it has been already mentioned; in Agile-Team, each Project is represented (split-up) as some WBS. The lowest levels of WBS nodes contain WorkItems. There is no principal difference between sub-project nodes and WorkItem nodes of the common Project WBS Tree. WorkItems can have sub-WorkItems, etc., thus playing a role of sub-Projects. However, since usually WorkItems play roles of exact tasks, which should be implemented by a concrete employee, the WorkItems have some additional properties regarding to ordinary sub-Project nodes.

A WorkItem is characterized by a unique ID (Identifier), a Title, a Description of the job, and by many other properties such as Priority, Originator, etc.

WorkItems can have various Kinds. For example, they can represent parts of the work of a Project (the Task kind), or they can come from detected bugs (the Bug kind), or from changes to the Project plan.

A WorkItem can have multiple Activities. For example, there might be a Bug, which first requires Analysis of the bug before the required work can be estimated, and then there might be Implementation (coding), Documentation, Testing, creation of an entry in a product Knowledge Base on the WEB, and a final Review.

For some WorkItems such as bugs and changes to a base lined plan, it is convenient to handle them as a set of Activities and manage these Activities together as one WorkItem. For other tasks each WorkItem can consist of one Activity.

WorkItems can refer to a parent WorkItem; this can be used to model a Work Breakdown of a project. This means that it is both possible to structure some work in the type of sub-WorkItems and in the type of Projects.

Activities

Each WorkItem has some Activities. They are:

- Analysis Implementation (Coding)
- Documentation
- Testing
- Knowledge Base
- Review.

Each Activity can have an assigned Resource to accomplish it, and time estimation (Rest time) needed to complete this Activity.

Activities have various states:

- Active
- Inactive
- Done

An Activity has many optional fields (Properties), which describe the Activity and its state.

It is important to understand that the Activity is a fundamental unit, used by Agile-Team. People often think that a minimal manageable unit in Agile-Team is a WorkItem, but the reality is that Agile-Team operates using Activities. Managers assign work to other people by Activities, you report spent time on Activities, and a planning subsystem uses Activities for its scheduling algorithm.

Resources

Enterprises perform work. Work is performed by people. Persons, who are working on Projects, are called **Resources**. Resources can be organized in **Groups**. Groups can be created for planning or administration purposes. For example, to assign some Activities to several people, or to grant some permission for them. One resource can be a member of several groups.

Each **Resource** in Agile-Team has an associated **Calendar** which specifies how many hours he should work during the working days of a week. The **Calendar** also specifies holidays.

Time Reports

Time Reports are one of the core elements of the Agile-Team. People report time on Activities during their work. There are two special views (**TimeReport Daily** and **TimeReport Monthly**), where each person can see which Activities in which WorkItems are assigned to him/her. The **TimeReport Monthly** view shows a working Calendar for a person, and daily time balance during a month.

The Planning facility uses Time Reports for calculation of the time rest for each activity.

Versions

Software is developed in versions. New features and bug fixes appear in a given version – but a version might also introduce new bugs. When a software version is sent out to the customers we talk about a release of the software.

Agile-Team has a separate **Version** dimension, which represents the version numbers of the software releases. WorkItems can be linked to the Version dimension.

The version management facility? Feature? in Agile-Team can assist the software developing process in the following areas:

- Maintaining a History of releases, -what did we release in the past.
- Planning of releases, -what will we solve in each release.
- Control over BUGS: -when they appeared and-when they were fixed.
- Generation of Release Notes, -what is done from one version to another.

- Generation of a Knowledge Base, -what problems are known in a given version.

Most software is created as a linear set of versions, where the next version of the software is based on the top of the source for the previous version. But when the software grows larger and more mission critical for the customers, it becomes important to support previous versions of the software while developing the new version of the software. In this case, most teams will use a source control system, and the source code will be branched, so that the previous version of the software can be maintained without introducing bugs because of new development. Agile-Team directly supports the concept of Branches.

Phases

Phases is one more Dimension of Project management models.

When working on several projects, companies usually divide each project into several Project Phases to improve Project management. Usually Project Phases are linked to completion of some important Project deliverables. To summarize, Project Phases form the Project life cycle.

In project management theory, project phases are usually defined in the following terms. A *project phase* is a part of the project life cycle, into which activities to manage the project are grouped. A project phase is major logical grouping of work on a Project. A Phase also represents the completion of a major deliverable or a set of related deliverables.

A phase can be the time between two major project milestones, during which a well-defined set of objectives is met, some works are completed, and decisions are made to move or not move into the next phase.

Phases are significant for the planning algorithm, because it allows prioritizing WorkItems by time periods.

Since most Phases include some main Phase deliverable, so most Phases usually take their names from these deliverables. Depending on which Project methodology is used waterfall, evolutionary, SCRUM, etc., different software Project Phases can be used.

For example:

- for the waterfall model, phases can be : planning, analysis, design, implementation (coding and documentation), testing, sailing, support;
- for the evolutionary model, phases can be – design, realization of base functions, pre-Alpha, Alpha, pre-Beta, Beta, pre-release, release, etc.;
- for the SCRUM model, phases correspond Sprints.

Usually, Phases are not strictly successive. They can be concurrent.

Parts

Agile-Team has a separate dimension called **Parts**, which can be used to group WorkItems in the architecture dimension for Projects...

For example, for the Agile-Team application itself it is useful to reflect whether a given WorkItem concerns the Agile-Team Installation program, the Agile-Team database, which stores WorkItems, or the Agile-Team **Explorer** window, etc. This gives a possibility to inspect, which WorkItems are being done on the given Part (for example, Installation) across all sub-Projects of the Agile-Team Project. Therefore, the **Part** tree provides an alternative way to structure and inspect the plan.

Small projects normally do not use this feature. But the **Part** tree can be introduced to a Project at any time when this Project becomes big enough to also use the Part dimension.

The **Part** tree nodes can be:

- Groups
- Products
- Parts.

Groups can unite some other sub-Groups, Products, and Parts. A Product can contain only Parts, and a Part can contain only other Parts.

User-defined Dimensions

It is possible to create new hierarchic Dimensions, and group WorkItems according to these hierarchies. Examples can be: **Departments**, **Areas** (countries and towns), **Customers**, etc.

For example, two (or may be more) different departments can be concurrently involved in execution of a big project, and it can be reasonable to create a special Dimension named, say, “Departments”. It can contain the first level nodes with the names of companies involved into the enterprise activities. The second level nodes can be names of departments in these companies. Then sub-Projects and even actual WorkItems can be linked to the different departments in this “Departments” user-defined Dimension. Then it will be easy to select some department in this Dimension and see what sub-projects are implemented by this department, to see how much time is used by some department onto some project, etc.

Planning

Planning is a process of assigning resources, order and time to the WorkItems.

Planning in bigger Projects is a rather complex and time-consuming work. Even in the case, when a Project is detailed estimated and persons have been assigned to the WorkItems, it takes considerable time to create a plan and calculate estimated milestone dates.

And since software projects have a very dynamic nature, it is constantly needed to update the plans.

Software projects are a human activity - the planning cannot be done like planning industrial processes, but require communication with the people involved.

In a larger organization, the job either becomes too complex - or the organization accepts not doing optimal scheduling.

Scheduling needs to be a highly interactive activity with trials - immediate GUI feedbacks and – modifying the schedule – but done in a way so the schedule will be automatically maintained with changes to the plan.

Planning software Projects should usually be a Resource focused scheduling. It is the resources that are limited “resources”.

In some cases, a Resource can work under just one project for some manager, but, when a Resource works for more than one Project manager, planning becomes even more complex.

Planning is heavily based on good estimations that usually require proper buffers allocated for the plan to hold.

Working with Agile-Team

Agile-Team has a number of different Views.

The main Views of Agile-Team are:

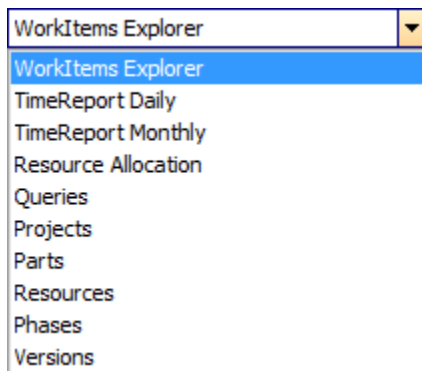
- **WorkItems Explorer.** This is the central View for inspecting the WBS of Projects. In this View you see what sub-Projects are contained in a Project and what WorkItems are contained in these sub-Projects. By filtering and grouping it is possible to make various analyzes.
- **TimeReport Daily.** A convenient View to enter time reports.
- **TimeReport Monthly.** This View shows time usage for all days for a month and accumulated used time over or under the Calendar norm.

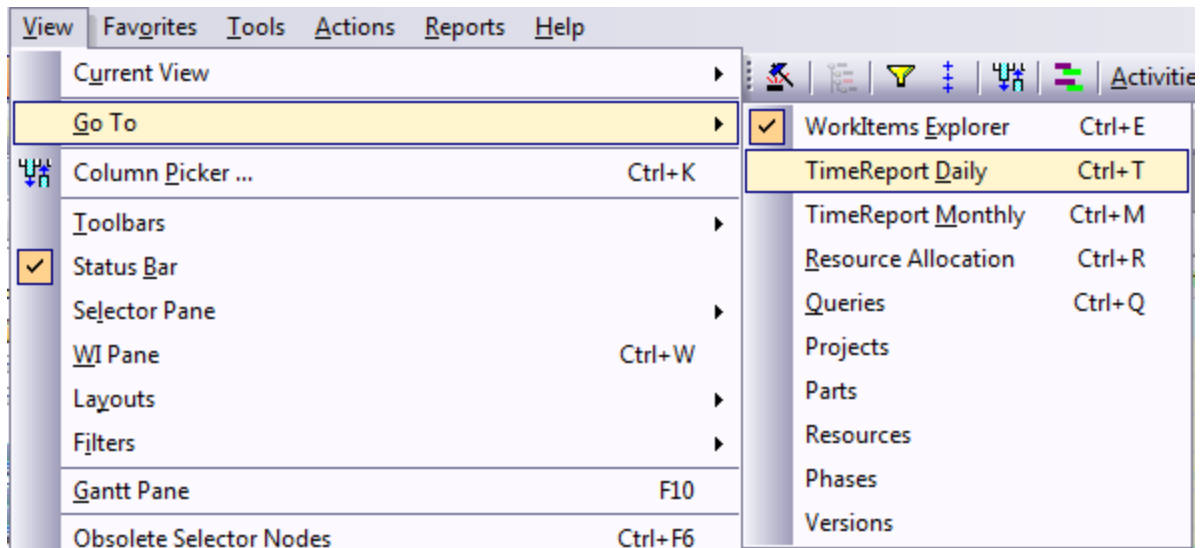
All predefined and user-defined Dimensions have corresponded Views: **Versions, Projects, Resources, Phases, Parts**, and the View for each of the user-defined **Dimensions**.

There are also two special Views:

- **Resource Allocation.** This View is used for assigning jobs for a Resource in order to be used by the Planning tool.
- **Queries.** This View shows results obtained from fully customized SQL queries.

These Views can be selected in the drop-down list at the Main Toolbar or using the **View/GoTo** menu item, like it is shown at the figures below:





Each View, except of the **Daily** and **Monthly Time Report** Views, has a **Selector**, which is a tabbed pane, where the main entities of Agile-Team are displayed as hierarchical trees, and the **Data** panel, which is used to display results of selection or search operation.

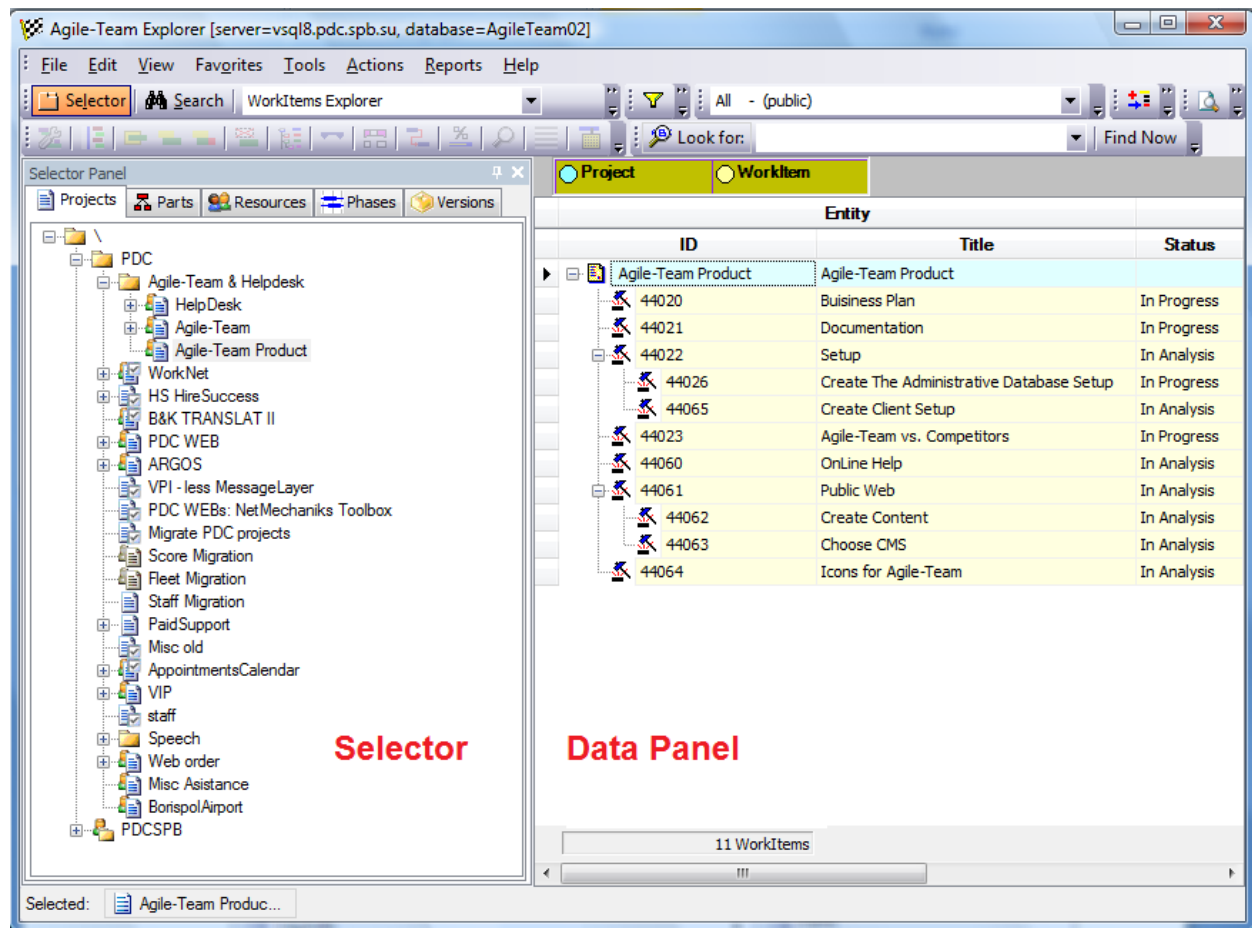


Figure 1 Selector and Data Panel

Tree Operations

Four basic operations are available in each tree in order to manipulate the tree items:



- **Add SubItem** – Creates a new Tree Node. Invokes the **Item Property** dialog in order to set up it.
- **Delete Item** – Drops the selected item.
- **Move Item Up** – Used to organize items in a tree.
- **Move Item Down** – Used to organize items in a tree.

To edit selected tree node properties, you need to press the “Enter” key, or double-click on node. Then the node properties dialog will be shown.

Drag-n-drop

Drag-n-drop is widely used in Agile-Team. It allows to reorganize nodes in trees, or to easily set values. For example, if you want to set some WorkItems to be completed within some Phase, simply drag those WorkItems to the correspondent node in the Phases tree in Selector.

Inheritance

Inheritance is one of the core features of all entities of the Agile-Team. If you create a subitem of some kind, say sub-Project of the existing one, then a new project will inherit most properties from its parent by default. This will be indicated with a small letter “I” near the property field.

Most of the controls that are used to set properties have a special entry “**Set Inherited Value**”. All trees, except of the Project tree also have such special node. This node is used to set an inherited value with drag-n-drop.

Project Management

Projects are the main entity of management in Agile-Team. A Project is the basis of periodic reporting, planning, etc. Usually a person is assigned to be the manager of a Project, and there is a set of persons assigned to perform the activities in the Project.

Agile-Team handles Projects and WorkItems as one big tree that can unite Projects into groups and divide Projects into sub-Projects. Projects and sub-Projects are handled equally and have the same properties.

Projects are represented (split-up) as some Work Breakdown Structure. Agile-Team supports three kinds of WBS nodes: Projects, Groups and WorkItems.

Projects usually correspond to some real Projects developed by a company. You can think about a Project as a **process** or undertaking that encompasses an entire set of activities having a definable starting point and well-defined objectives. The delivery of the Project goal product signals the completion of the project. Projects are usually required to be accomplished within limited **resources**.

Usually it is mainly Projects, which can have initial contracts for developing products. Therefore, it is the Project nodes where you can specify whether its sub-nodes and related WorkItems have WBS Numbers.

Groups represent logical nodes that can be freely used to group other nodes. There are two different kinds of Groups: *Groups of Projects* and *Groups inside Projects*. Groups of Projects are used to combine a number of Projects. Groups inside Projects (sub-Projects) can be used, for example, for a placeholder for bugs until it is decided when to fix them.

Remember that a Project cannot contain other Projects, only Groups. WBS numbers can be only inside Projects (and sub-Groups under Projects).

Projects can be in one of the following States.

Active		Projects/Groups are currently being worked on and WorkItems for these Projects will appear in people's TimeReport Daily or Monthly Views.
InActive		Projects/Groups are currently waiting to become Active. Active Activities for Inactive Projects/Groups do not appear in the TimeReport Views.
Closed		Closed Projects/Groups are completed and WorkItems from them will not appear in the TimeReport Views any more.

The State of the Project/Group is shown in the Project Tree with appropriate Icons.

In order to manage Projects, the Project Tree is used.

Project Tree Operations

Operation	Menu Command	Shortcut Key	Context Menu/Toolbar
Create New Project	File/New/Project	Ctrl+Shift+J	Add SubItem (Ctrl+N)
Create New Project Group	File/New/Project Group	Ctrl+Shift+G	Add SubItem (Ctrl+N)
Delete	File/Edit/Delete	Delete	Delete Item
Move Item Up	File/Edit/Move Item Up	Alt+Up	Move Item Up
Move Item Down	File/Edit/Move Item Down	Alt+Down	Move Item Down
Edit Project Properties	File/Properties	Enter	Properties
Renew WBS numbers	Edit/Renumber Subitems		Renumber SubItems

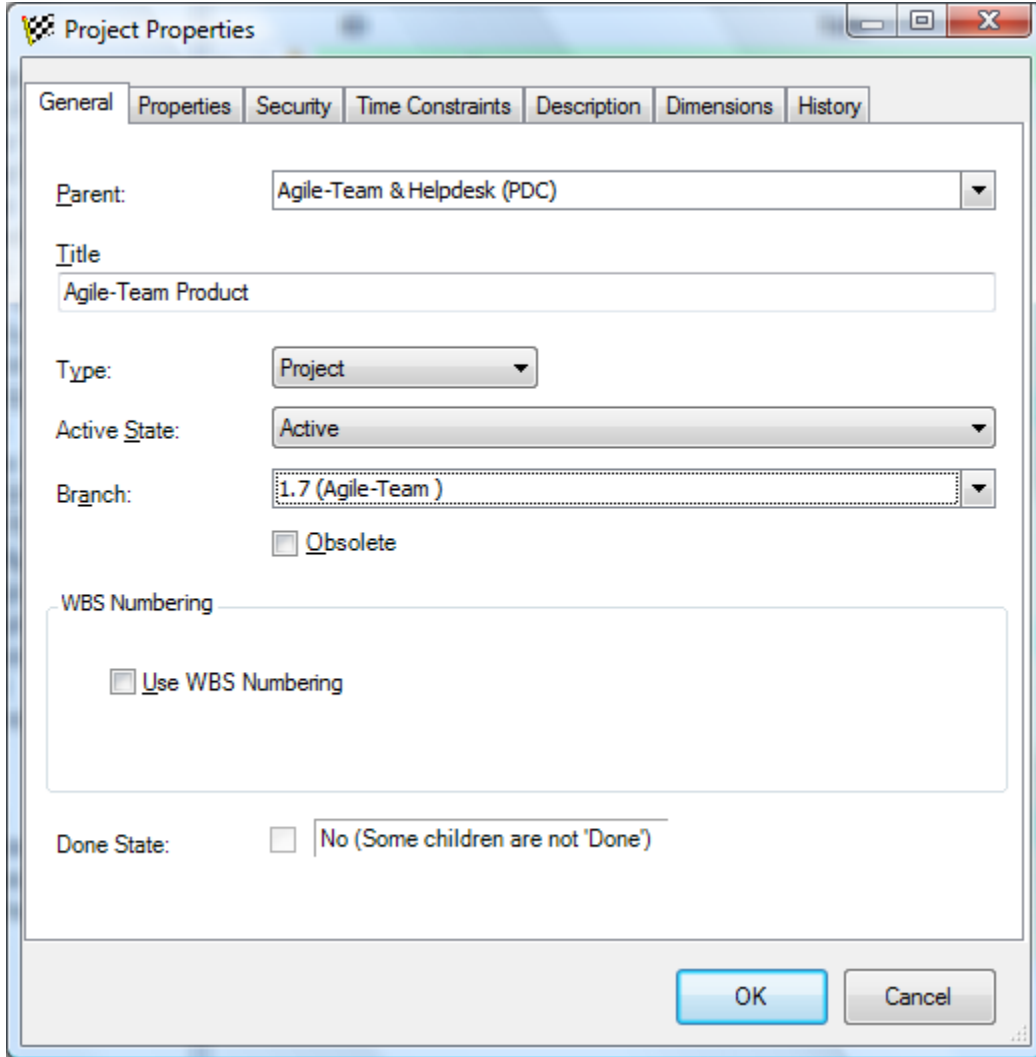
Project Properties Dialog

When you are creating a new Project or changing an existing one, the **Project Properties** dialog is used. This dialog is invoked by double clicking on the node or simply by pressing **Enter**, when the node is selected. Also it can be opened with the **Properties** commands from the context menu for a Project node and from the **Edit** menu.

Projects can have a large number of properties. These properties are arranged in several tabs.

General Tab

In this tab you can inspect/set general properties of the Project node.



The screenshot shows the 'Project Properties' dialog box with the 'General' tab selected. The dialog has several tabs: General, Properties, Security, Time Constraints, Description, Dimensions, and History. The 'General' tab contains the following fields and controls:

- Parent:** A dropdown menu showing 'Agile-Team & Helpdesk (PDC)'.
- Title:** A text field containing 'Agile-Team Product'.
- Type:** A dropdown menu showing 'Project'.
- Active State:** A dropdown menu showing 'Active'.
- Branch:** A dropdown menu showing '1.7 (Agile-Team)'.
- Obsolete:** A checkbox that is currently unchecked.
- WBS Numbering:** A section containing a checkbox labeled 'Use WBS Numbering', which is currently unchecked.
- Done State:** A checkbox that is currently unchecked, followed by a text field containing 'No (Some children are not 'Done')'.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Parent

This is a Parent WBS node in the Project Tree. This name consists of two parts. Text before brackets is the name of the Parent node itself, and text in the brackets is the path to the parent node from the Project tree root. You can change the parent node using drop-down tree control at this tab.

Title

Each node in the Project tree should have the title that is unique in the current tree branch. The title can be up to 255 characters long.

Type

You can switch the node type from the **Project** to the **Group** and back. But notice that you cannot change the **Group** to the **Project** if the tree branch of this node already contains a **Project** type node.

Active State	This control is used to set a Project node state. Here you can activate, postpone or close a project.
Branch	This field can be used to set in which Product branch this project will be implemented. If this field is not empty, the current version in the selected branch will be set as “Implemented in” for all WorkItems, that belong to this project, when that WorkItems are marked as “Done”. See Version Management for more details.
Obsolete	This option can be checked ON to indicate that this Project node is Obsolete. All child WBS items will be also marked Obsolete. Any Activities for Obsolete WorkItems are disabled and Time cannot be reported.
WBS Numbering	WBS is an abbreviation for the Work Breakdown Structure. You can think about WBS as about a basic project diagram that documents and describes all the works, which must be done to complete the project. In Agile-Team the Work Breakdown Structure is represented as the Project tree (with all WorkItems in this tree). A unique WBS number can (and normally should) be assigned to each Project (not to a Group). Such WBS numbers will be the first level numbers. Then all sub-Project nodes (sub-groups of Projects) under this Project (with the specified WBS number) will have sub-WBS numbers below this project WBS number, like this: The screenshot shows a text input field with the label 'WBS Number:' on the left and the value '458.1' on the right. The field has a light gray border and a small arrow icon on the right side. Here 458 is a parent Project WBS number and 458.1 is a child-Project WBS number. That is WBS numbers have hierarchical structure.
Use WBS Numbering	This option is checked ON if the Project uses WBS Numbering.
Done State	This field indicates that all child nodes are Done , or some of them are Not Done . This state is automatically calculated based on states of all WorkItems in this Project node (and all sub-nodes).

Properties Tab

This tab contains common but less significant properties of the **Project** node.

The screenshot shows the 'Project Properties' dialog box with the 'Properties' tab selected. The 'ID' field is set to 44019. The 'Require Comment for TimeReports' dropdown is set to 'Not Required'. The 'Manager' dropdown is set to 'Oleg Erjomin (Agile-Team)'. The 'External ID' field is empty. Under the 'Layouts' section, 'WI Dialog Layout' and 'WI Pane Layout' are both set to 'Predefined'. Under the 'Project Properties' section, 'Contract State' is set to '<Not specified>' and 'Explanation for Time Changing' is set to 'Required'. The 'OK' and 'Cancel' buttons are at the bottom right.

ID	A unique identifier of the Project node. This is an informational field only.
Require Comment for TimeReports	This option can have Required or Not Required values. When Required is specified, then Agile-Team will require a short comment on each Time Report.
Manager	This field is used to register who is the manager of a Project.
External ID	In this field you can type in any string value. This External ID can be used to connect WBS items (Project nodes and WorkItems) in Agile-Team with other systems, for example, when exporting Time Reports into a bookkeeping system.
Layouts	Using these two fields, a Project Manager can set a default WorkItem dialog, and WorkItem Pane layouts. These layouts will be used if a user chooses the menu command View/Layouts/.../Default for Project

Contract State

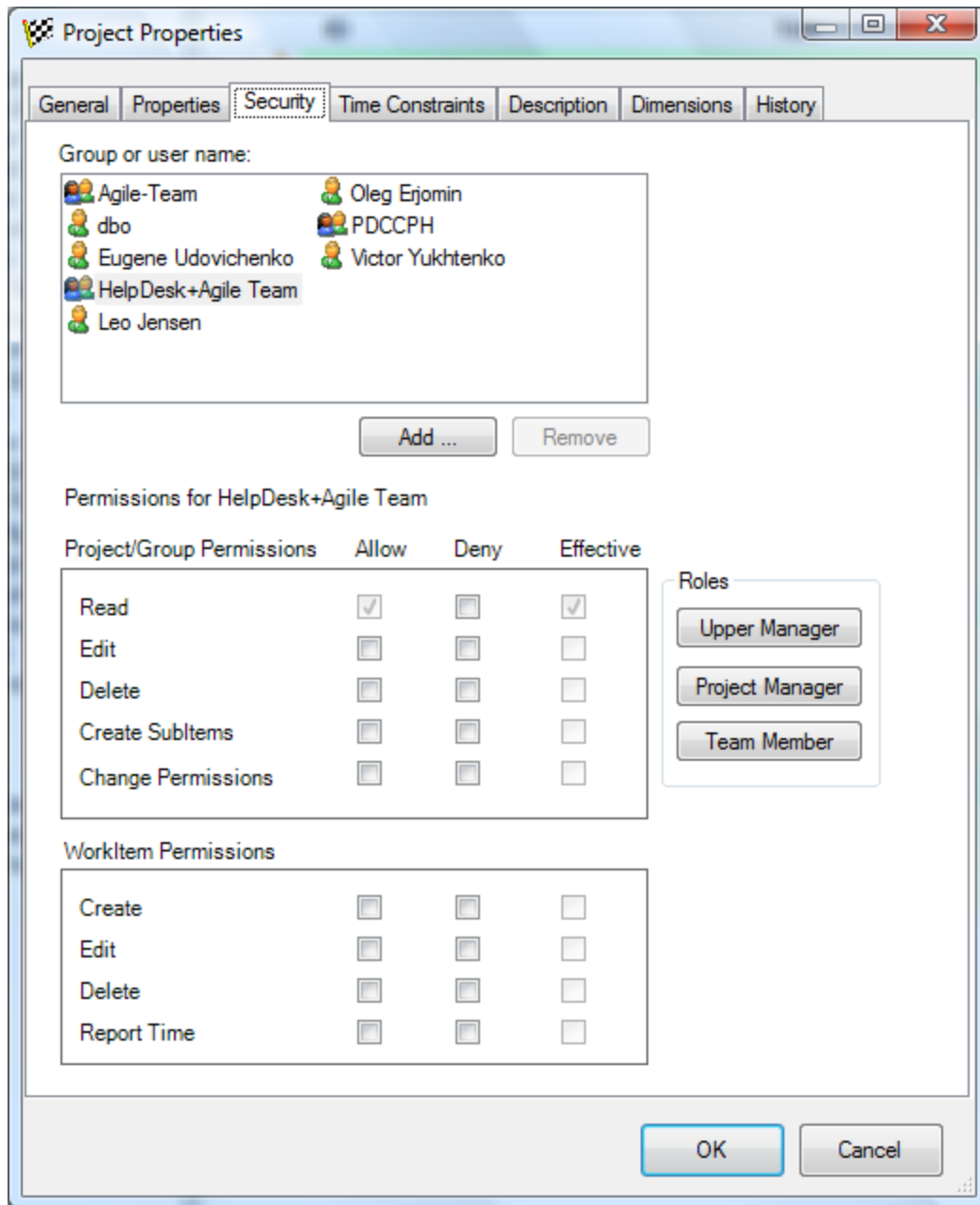
This field is used to specify whether the Project is executed under a contract. Possible values are: **Not Specified, No Agreement, Verbal Agreement, and Signed Agreement.**

Explanation for Time Changing

This option can have **Required** or **Not Required** values. When **Required** is specified, then Agile-Team will require a short explanation to each change of estimated **Rest** time from each Resource, except Managers of WorkItems.

Permissions Tab

The Permissions Tab is used in order to set access permissions on selected node. Refer to [Permissions and Roles](#) chapter for detailed information about Agile-Team security concepts.



Agile-Team demands that permissions are appointed separately for Projects/Groups and separately for WorkItems.

The following permissions are applicable for Projects/Groups: **Read**, **Edit**, **Delete**, **Create SubItems**, and **Change Permissions**. The following permissions are used for WorkItems: **Create**, **Edit**, **Delete**, and **Report Time**.

There are **three** Roles predefined for WBS tree access permissions:

Upper Manager – allowed only Read the properties of a selected Item and all SubItems;

Project Manager – has full set of permissions for a selected Item and all SubItems;

Team Member –is allowed to **Read** the properties for selected projects and all SubItems, and allowed to Create, Edit, and Delete WorkItems and to Report Time.

Time Constraints

This part of the **Project Properties** dialog allows to set parameters that are used for planning, and to calculate budget time, allocated for the project.

The screenshot shows the 'Project Group Properties' dialog box with the 'Time Constraints' tab selected. The 'Phase' dropdown is set to 'MS1 (Agile-Team)\1.7 Stage II'. The 'Parent Earliest Start' and 'Parent Latest Finish' fields are empty. The 'Earliest Start' and 'Latest Finish' dropdowns are also empty. The 'First Time Report Date' is '12.12.2005' and the 'Last Time Report Date' is '01.02.2010'. The 'Budget' section shows a 'Budget' of '4000,0' and a 'Calculate Budget Time' button. Below this, there are labels for 'Remaining Time Inside Parent:' and 'Sub Items Total Time:'. At the bottom are 'OK' and 'Cancel' buttons.

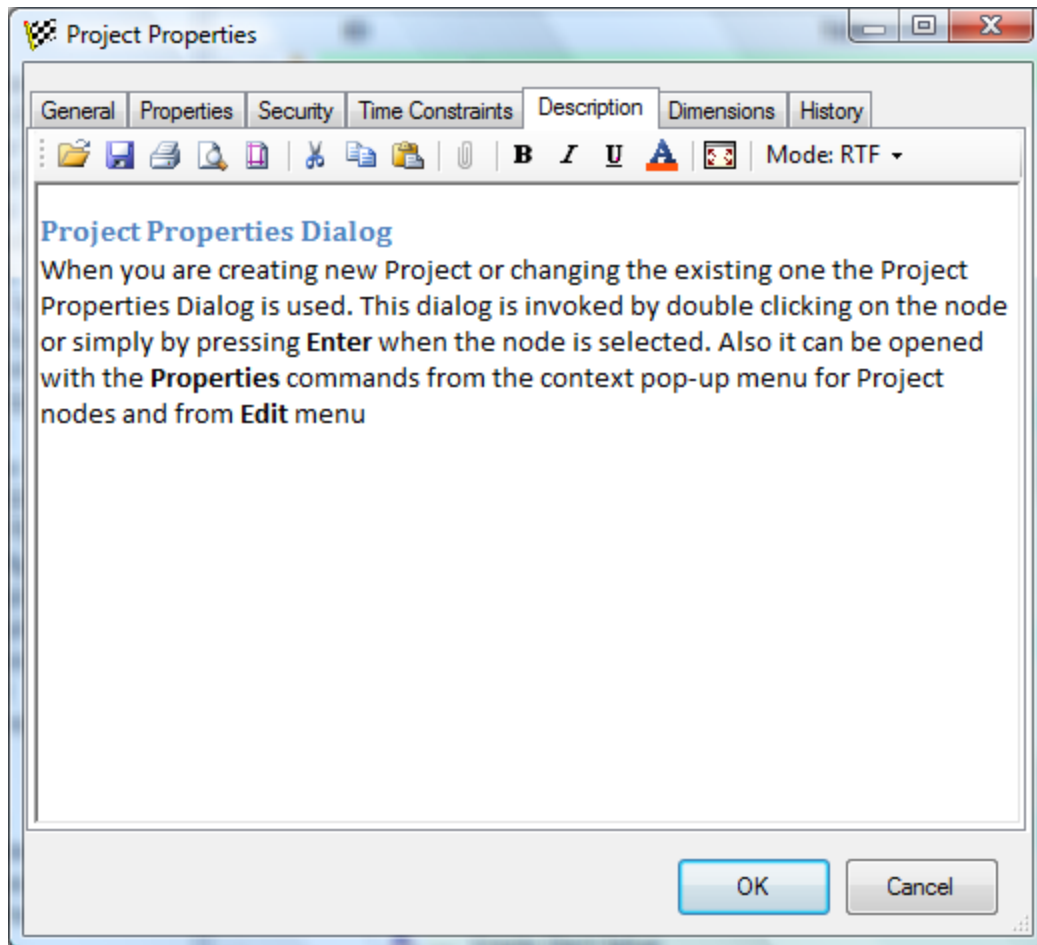
Phase This field allows selecting the Phase for the Project/Group.

Parent Earliest Start Shows the **Earliest Start** for parent Project.

Earliest Start	Defines the date that planning subsystem takes into account as the starting date for WorkItems scheduling. If the Earliest Start is specified, then WorkItems within a selected Project will not be scheduled to start before this date.
Parent Latest Finish	Shows Latest Finish for parent Project.
Latest Finish	Latest Finish is not taken into account for the planning algorithm, but if the calculated Earliest Start is later than the Latest Finish , this field will be marked red in the Explorer and seen on the Gantt (conflict areas).
First Time Report Date	This read-only field shows the calculated date for the first time report in the selected Project/Group.
Last Time Report Date	This read-only field shows the calculated date for the last time report in the selected Project/Group.
Budget	By the Budget option, it is possible to specify how many hours can be spent in Time Reports of the Project. The Budget option can be used to specify Time Boxes, or handle top down planning in contrary to the Total, Used, and Rest time fields, which is summed up in a kind of bottom- up project management. The fact that time, spent for a project fits budget time can be shown using WI Explorer grouping by project. If time, reported on WorkItems in a project, exceeds Budget Time onto this project, then times reported onto this project will be displayed in red. Button “Calculate Budget Time” helps to set up proper value for this field. Calculations are based on budget, estimated and spent time for child nodes, and for parent node.
Remaining Time Inside Parent	
Sub Items Total Time	

Description Tab

The Description field can contain the full description of a Project node, for example, goals, used tools, etc.



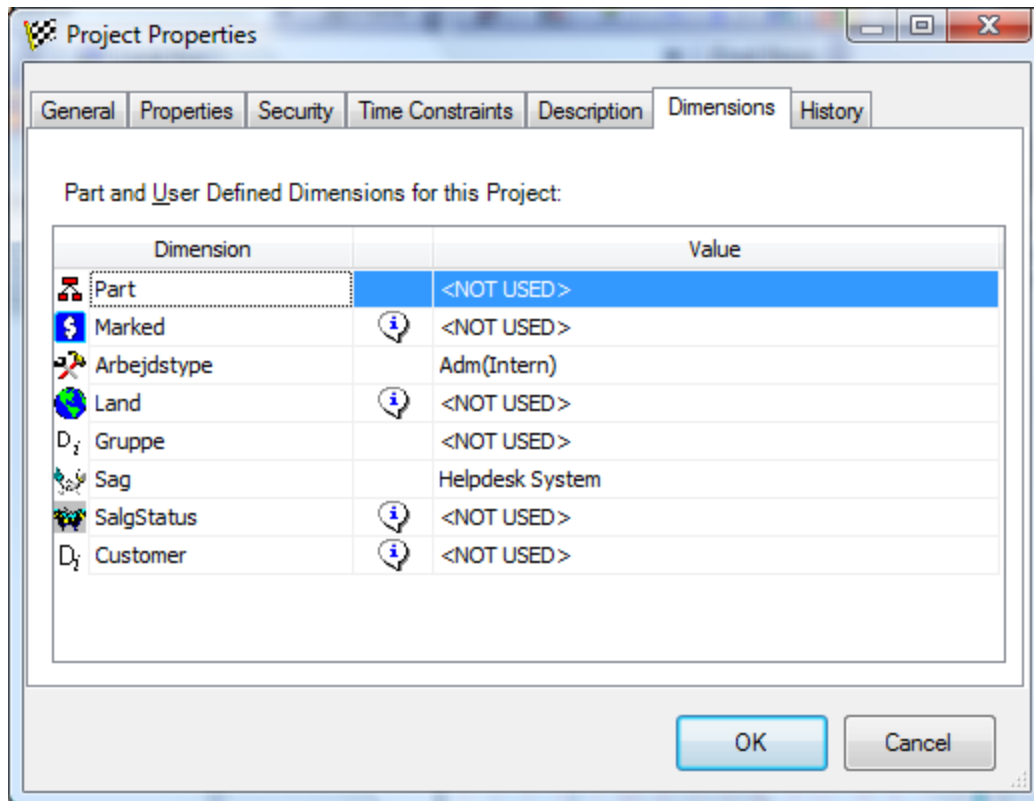
Description document can be **one of three** supported formats: Plain Text, RTF, or Microsoft Word Document.

Dimensions Tab

This tab contains Part and User-defined Dimensions, which are (can be) linked to this Project node.

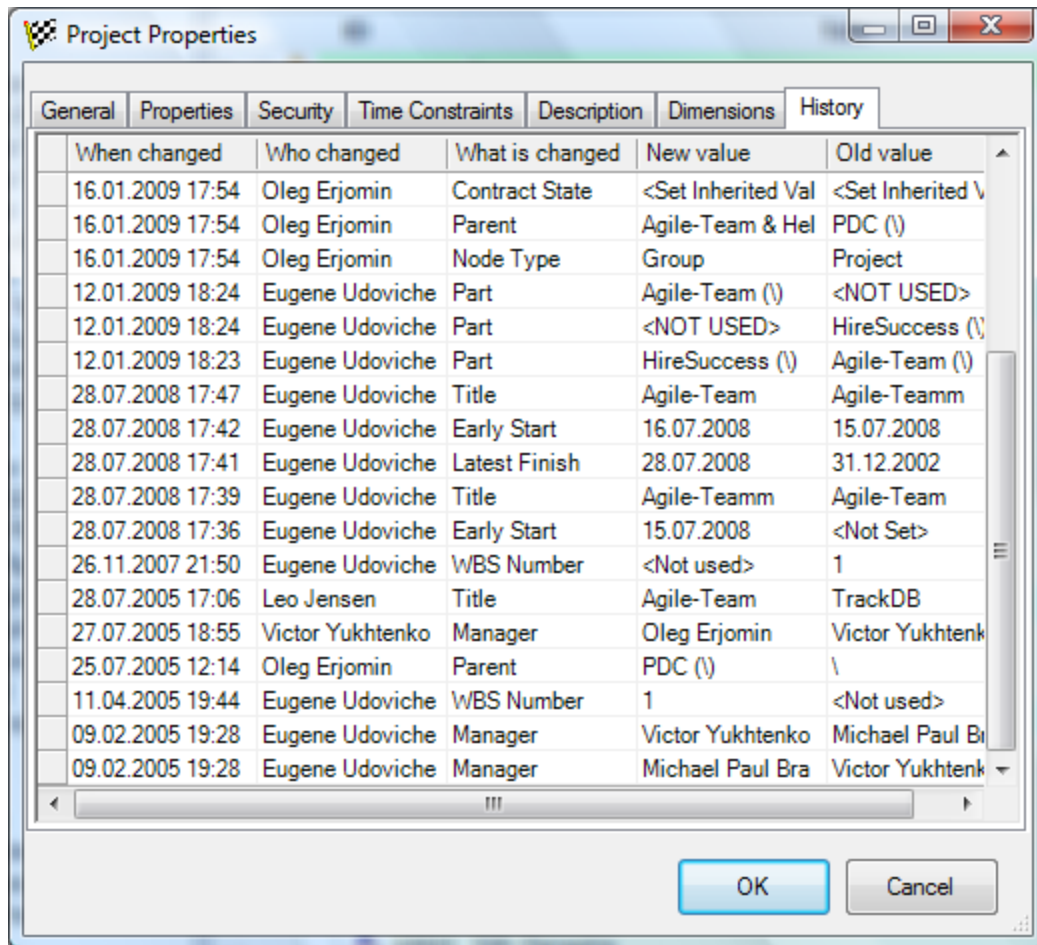
The Part Dimension can be used to specify the default Part for **WorkItems** in the Project node. If the Part hierarchy is not relevant for the Project, the **<NOT USED>** option should be specified.

Other User-defined Dimensions can be used to allow some project nodes to be linked to "parts" outside the **Part** tree of the project. This is useful, for example, for Dimensions shared among multiple projects. For example, the **Countries** dimension can be used to specify that some projects are developed in Denmark while [some](#) others in Russia.



History Tab

In the **History** tab all changes  to these Project node properties are tracked.



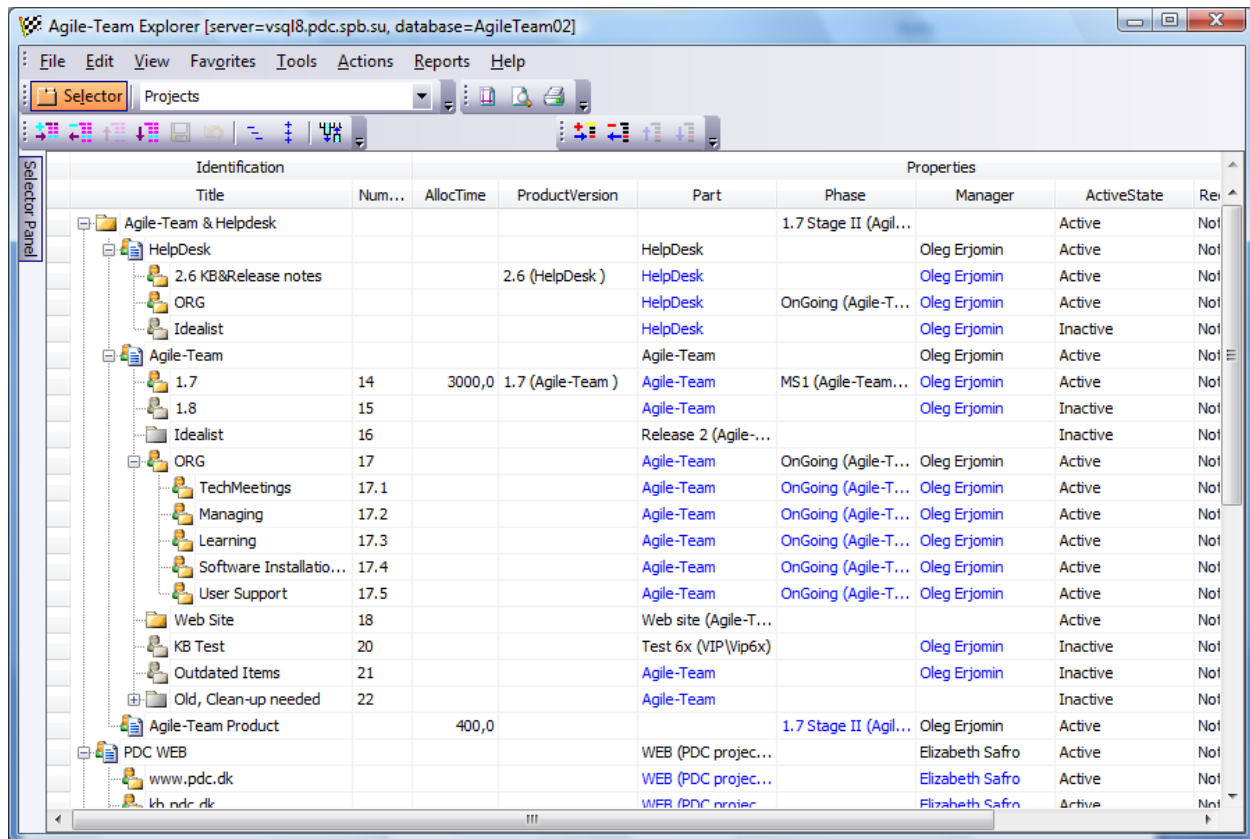
Project View

By selecting the **Projects** item in the **Select View** control of the Main toolbar, you can open the **Projects** view. The **Projects** view is a convenient tool for managing the portfolio of projects. It is easy to handle projects hierarchy in the **Project** tree. Simply drag and drop desired projects to a proper place.

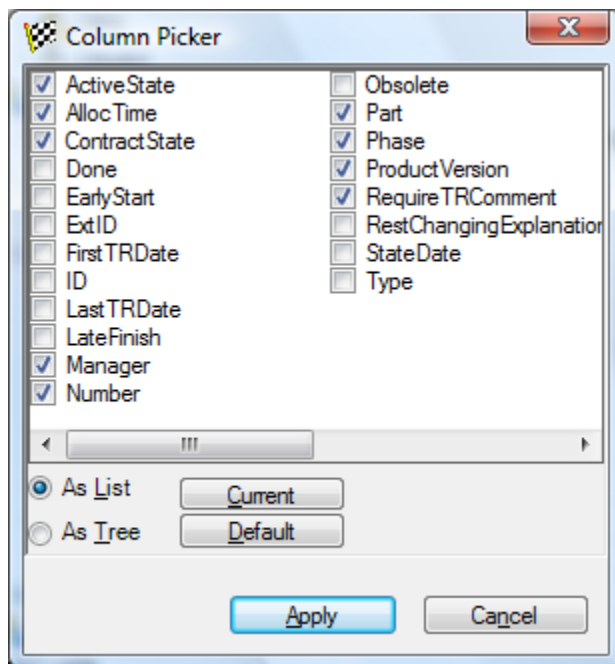
Like other views, the **Project** view contains two panes: the **Selector** and the **Data** panes.

Columns in the **Data** pane can display almost any project properties. If you wish to modify some property of a project, you can simply click on the cell with [this](#) the property and change its value using data type specific in-place editor.

Inherited values are marked with [blue](#) color.



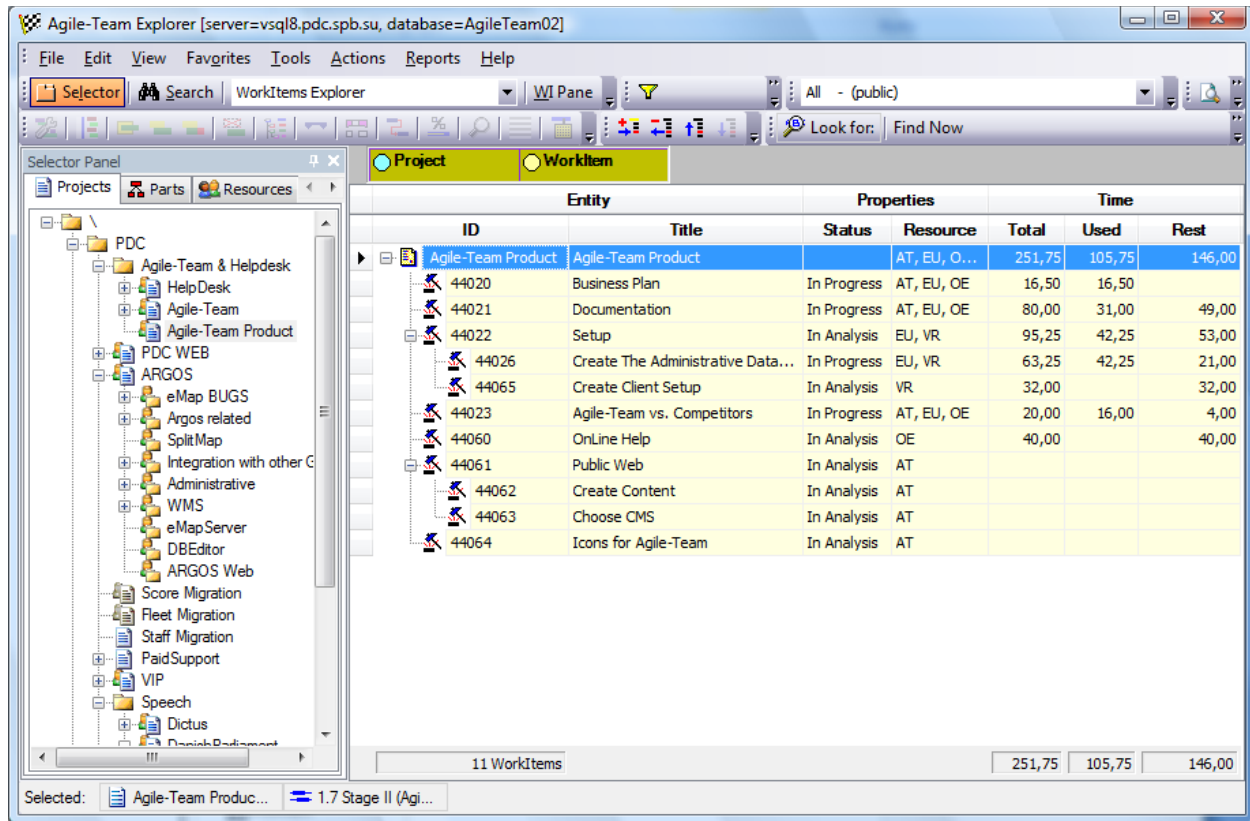
Columns that will be shown at the **Data** pane can be chosen from the **Column Picker**.



If you want to edit properties, that are not included in this column list, just invoke the **Project** Property dialog.

WorkItem Explorer

The **WorkItem Explorer** View allows inspecting the WorkItems that are selected according to specified Project, Resource, Phase, Version, Part, Dimensions and Filter or as a result of a [search operation](#). All operations with **WorkItems**, such as creating, editing, deleting, changing properties, etc., are usually performed using the **WorkItem Explorer (WI Explorer)**.



The **WI Explorer** consists of the following Panes:

- **Selector** – is a tabbed pane, where main entities of Agile-Team are displayed as hierarchical trees. The main purpose of the **Selector** pane is to set constraints according to which WorkItems are selected to be shown in the **Data** pane of the **WorkItems Explorer**;
- **Search** pane – is the pane, where the user enters conditions for [search for WorkItems](#);
- **Data** pane – is the pane, where the results of selection or search for WorkItems are displayed;
- **Gantt** pane – shows the result of [Planning](#) as a Gantt diagram;
- **WI** pane – is used to display and edit properties of the Workitem, selected at the Data pane.

All panes, except of the **Data** and **Gantt** panes can be shown, hidden, or moved at any place at the **WorkItem Explorer** screen. The **Data** pane is persistent. The **Gantt** pane is rigidly bound to the right border of the **Data** pane, and can only be shown or hidden, but not moved.

How to Show/Hide Various WorkItem Explorer Panes

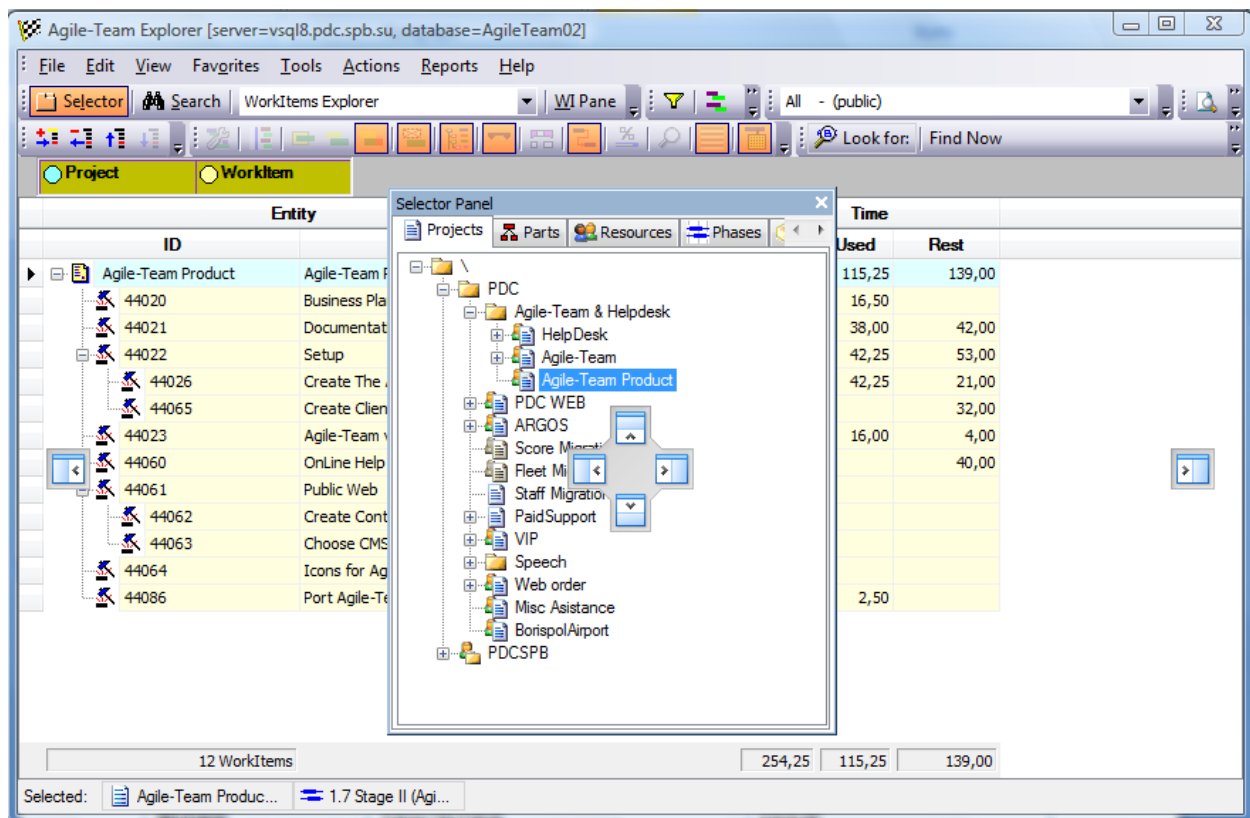
In order to show or hide some panes of the **WorkItem Explorer**, use the **View** menu.

Pane	Menu command	Shortcut
Selector	View/Selector Pane/Selector	Ctrl+L
Search	View/Selector Pane/Search	Ctrl+F
WI Pane	View/WI Pane	Ctrl+W
Gantt Pane	View/Gantt Pane	F10

Also, in order to hide a pane you can use a small “cross” icon at the pane title bar.

Some panes, like the **Selector**, **Search** and **WI** panes can be hidden automatically, when focus is lost. This is controlled by a small “pin” icon at the pane’s title bar.

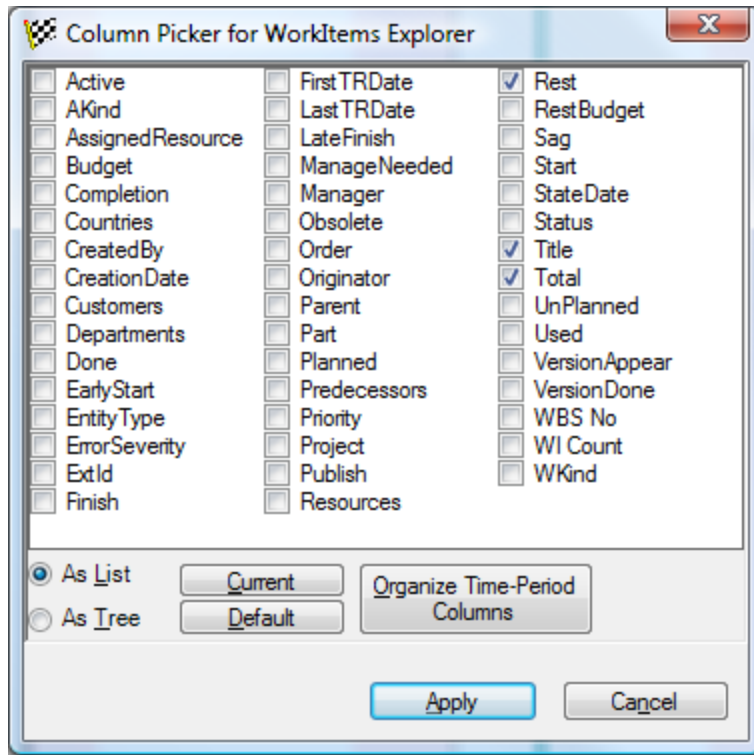
To move the pane, just drag it to the desired place while pressing-and-holding its title bar with the mouse. During the dragging, special icons will assist you to select the place, where it is possible to move the pane.



Columns

The **Data** pane of the **WorkItem Explorer** can display a large number of columns that correspond to the **WorkItem** Properties. In order to choose which columns are to be [shown](#) displayed, use the **Column**

Picker. It can be invoked with the menu command **View/Column Picker (Ctrl+K)**, [or](#) alternately using the toolbar button , or using the [View Customization](#) tool, described below.



Note, that the **Column Picker** doesn't display columns used for grouping. For example, as [it is](#) shown in the picture above, there is no [the](#) **Resource** column in the column list.

Columns are united in four bands: **Entity**, **Properties**, **Time**, and **Dimensions**.

ID This Column displays the identifier for an item being displayed in a row. If the item is a **WorkItem**, then the WorkItem Identifier (e.g., 10225) is displayed in this row. If the item corresponds to a WorkItem Activity, then the Activity name is displayed in this row of the ID column. If a row displays a grouping item, then this cell displays the value of the grouping. For example, this can be a **Project** node name. (Sounds complicated, but very natural on the screen).

The **ID** column is the only column that cannot be hidden, and is always displayed at the **Data** pane.

Active This field shows the state of a WorkItem. It can be **Active** or **Inactive**.

AKind Activity Kind. Can be one of the following: **Analysis**, **Implementation**, **Testing**, **Documentation**, **Knowledge Base**, and **Review**.

Budget	Budget Time, allocated for the WorkItem.
AssignedResource	A Resource, assigned for the Activity. For grouped rows it is a comma separated list of Resources.
Completion	Completion of the Activity in percents percentage: $C=(Used/Total)*100$.
CreatedBy	Resource who created the WorkItem
CreationDate	Date of creation of the WorkItem
Done	Done state of Activity/WorkItem. Can be Yes/No .
EarlyStart	The earliest date that planning subsystem takes into account as the starting date for WorkItem scheduling.
ErrorSeverity	Error Severity can be one of the following: Normal, Unlikely Critical, Critical .
ExtId	An optional string value that can be used for interfacing interface with other systems.
Finish	A finish date of the Activity or/and WorkItem calculated by the Planning system.
FirstTRDate	The first Time Report date of the Activity/WorkItem.
LastTRDate	The latest Time Report date of the Activity/WorkItem.
LateFinish	The Latest Finish is not taken into account for the planning algorithm, but if the calculated Finish is later than this field, it will be marked red in the Explorer and seen on the Gantt (conflict areas).
ManageNeeded	A calculated field that indicates that some attention is needed from a manager. The column is empty if no action is required, otherwise, it indicates the reason why management is needed: Analysis done, Estimate changed, WorkItem created, etc. On the grouping levels, this information is aggregated to show if any action is needed to be taken.
Manager	A Resource that is the Manager of the WorkItem.
Obsolete	Indicates whether the WorkItem is marked Obsolete (Yes/No value).
Order	Provides “sorting as in the Selector tree” of Project nodes and WIs in Data

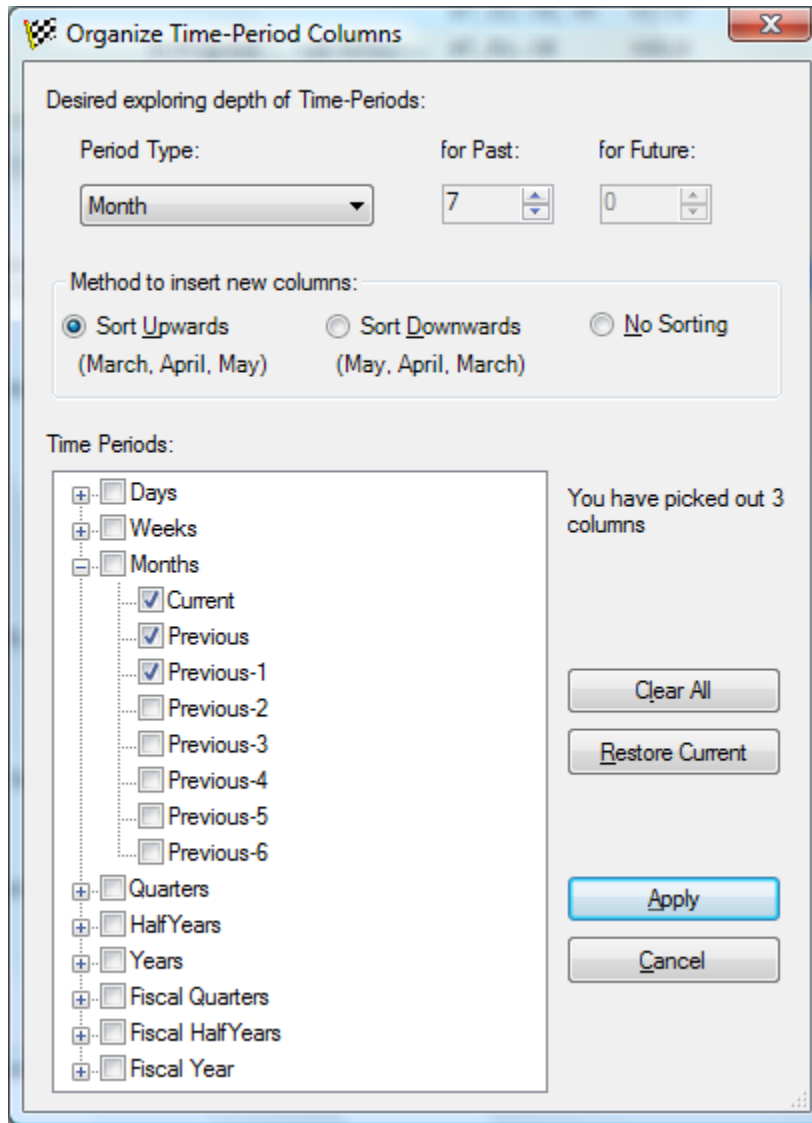
pane of Explorer when there are no sorted columns.

Originator	This column displays as to 'who' is registered as the Originator of the WorkItem
Parent	Parent WBS identifier.
Part	Displays the Part assigned to the WorkItem.
Phase	Displays the Phase which the WorkItem belongs to.
Predecessors	The comma separated list of Predecessors of the WorkItem.
Priority	This column displays Priority level from 1 to 9.
Project	Displays the Project, which contains a WorkItem.
Publish	Yes/No value indicating that a WorkItem is ready to be published in the Knowledge Base and Product Release Notes.
Resource	This Column displays nicknames of Resources assigned to Activities in WorkItems and nicknames of Resources that spend time onto Activities. If there are multiple persons assigned to and spent time onto an Activity, a separate row is created for each Resource.
Rest	This is the sum of currently estimated remaining times for Activity/WorkItem or Grouping node.
RestBudget	Calculated remaining of Budget Time: <i>RestBudget = Budget – Used</i>
Start	Displays scheduled Start date, as a result of a planning algorithm.
StateDate	Shows the date, when the Status of the WorkItem was established.
Status	Status of the WorkItem. It can be one of the following: Entered, InAnalysis, Analyzed, InProgress, InReview, Pending, Obsolete, Closed, Done, or Inactive.
Title	This column displays Titles of the items being shown in rows of this Column. This means that if the row contains WorkItem's data, then this column displays a WorkItem's Title, otherwise if the row is a grouping one, this column shows the title of the grouping item. For example, in case of grouping by Resource, this column will show a full Resource Name.

Total	Total time is sum of Rest and Used: <i>Total = Rest + Used</i>
UnPlanned	This column shows the time remaining after scheduling. This is a warning saying that a planning system has not succeeded to schedule all times for this WorkItem.
Planned	This column shows the Planned time for an Activity/WorkItem or a Grouping node.
Used	This column displays a sum of all Time Reports for Activity/WorkItem or a Grouping node.
VersionAppear	For Bugs type WorkItems this column displays the Version where the Bug is has appeared.
VersionDone	This column displays the version where the WorkItem is implemented.
WBS No	Shows the WBS number of the WorkItem or Project
WI Count	For each grouping row it shows the number of WorkItems in the group
WIKind	WorkItem Kind. Kinds of WorkItem are: Bug, Task, Issue, Question , and Note
WorkItem	By default this column is used for grouping; therefore, it is not seen in this list. Ordinarily this column displays the ID of WorkItem

Along with the columns, described above, there is a number of Time Period columns. Time Period columns display sum of time reports (used time) for the specific periods. A special dialog box is used to

organize such columns. It is invoked by a button at the Column Picker or [view customization tool](#), described below.



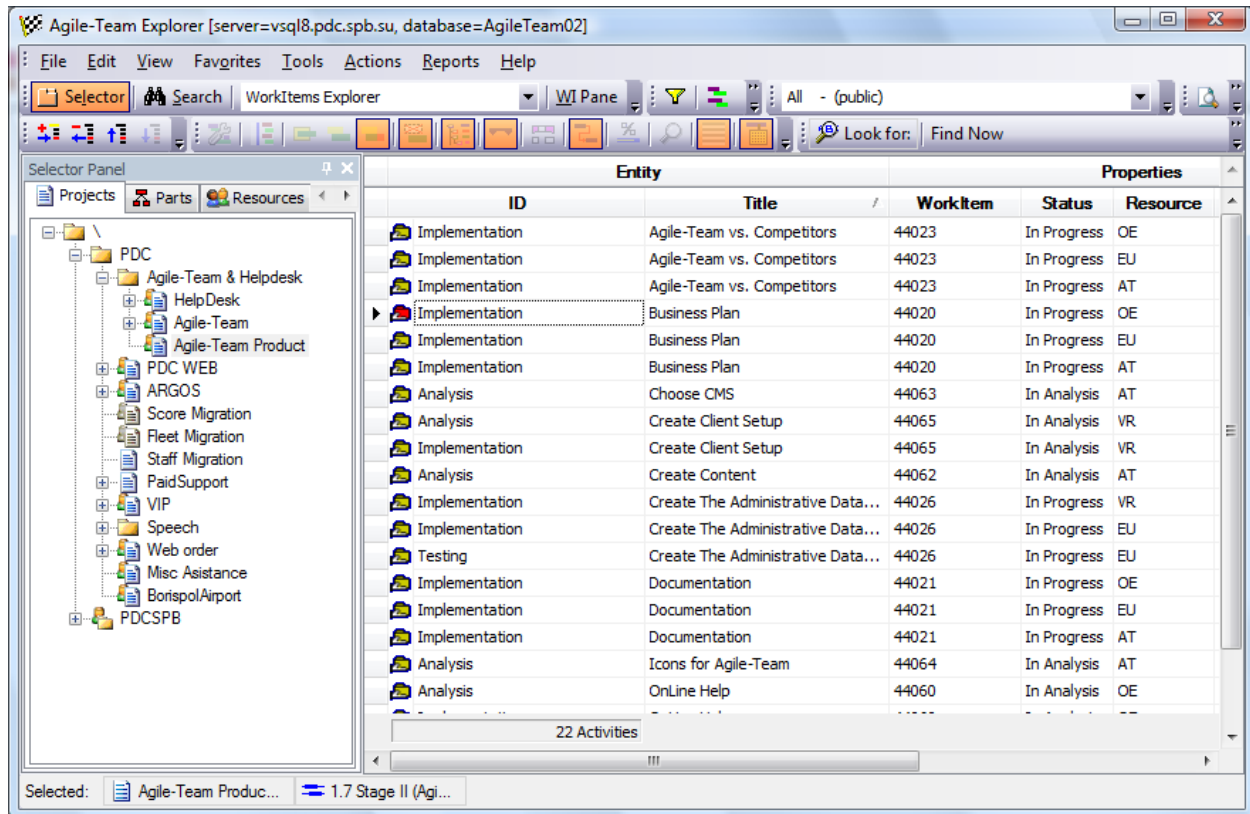
In this dialog you can choose to display columns for the following types of time periods: Days, Weeks, Months, Quarters, Half of Year, Years, Fiscal Quarters, Fiscal Half of Year, Fiscal Years. For each type of time period, you can select the desired depth of exploration for past and for future. The number of picked columns is displayed.

Note, that time period columns require a lot of calculations. So, the large number of such columns can impact the Agile-Team performance.

Activities

As we told before earlier, the fundamental manageable unit in Agile-Team is Activity. It is important to understand, that when you doing some search or selection, then result will contain the set of Activities.

that meet the search or selection conditions. If the grouping in WI Explorer is not used at all, then the Data pane will contain the list of selected Activities.



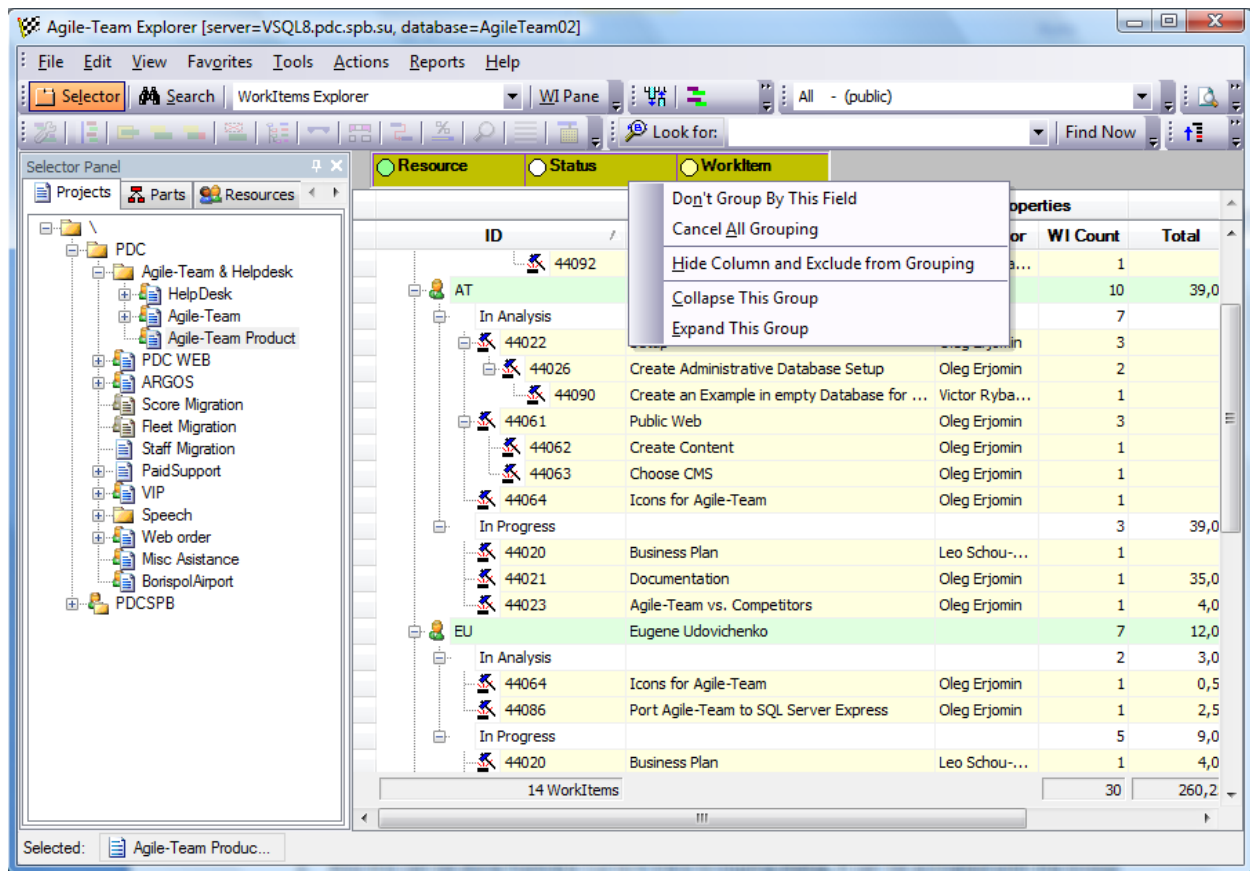
But usually the Grouping by at least one field is used. In most cases, you will prefer to think about Projects as a list of WorkItems, rather than a list of Activities. Thus, at least the grouping by WorkItems is used.

When Grouping is used, [then](#) you can hide/show Activities any time by pressing **F4** hotkey, or with menu command View/Activities.

Grouping

The Agile-Team WorkItems Explorer view has the possibility to group WorkItems using any of the Columns in the Properties and Dimensions bands.

It is possible to select several levels of groupings. [The](#) An interesting thing about grouping is that the **Time** columns and **WI Count** are summed for each level of grouping. For example, this can give a quick overview of how much work is assigned to each person in the team, how much work there are in each sub-Project, how much work there are for each Priority Level, etc. Each lower level in the tree gets a slightly different color.



For example, in this picture you see that grouping is done with the Resource, Status, and WorkItem properties.

Grouping with some Property can be created by **two** different ways:

1. Right click in the column header to pop-up the context menu in which you **should** select the **Group by This Field** command.
2. Also this can be done from the **Current View Grouping** dialog. It can be activated with the **Group by** button from the **Current View Summary** dialog, which can be opened with the **View->Current View->Customize Current View** command

Grouping column headers are displayed in **Grouping Bar** at the top of the **Data** pane. The group order can be easily changed by dragging the column headers within the **Grouping Bar**.

Context menu for the group columns allows:

- Cancel the grouping by selected field;
- Cancel All grouping;
- Expand the selected group;
- Collapse the selected group;

Sorting

Clicking in any Column header specifies that WorkItems should be sorted according to this Column. Repeated clicking in the same Column header specifies that WorkItems should be sorted in reverse order.

When sorting is ascending, there will be shown the little **Up** arrow in the column heading:



, and when sorting is descending, there will be shown the little **Down** arrow:



When the shift key is ~~held down~~ depressed during column clicking, it is possible to sort on multiple columns.

Changing Order of Columns

By dragging columns left and right, the order of columns can freely be changed. Also, the order of columns can be changed in the **Current View Columns** dialog.

Resizing Columns

Columns can be freely resized.

By double clicking at the border between column headers, the columns will be automatically resized to be able to fit their Title texts. By double clicking at the border between band headers, all columns in the left band will be automatically resized to be able to fit their Title texts.

WorkItem Dialog and WorkItem Pane

The **WorkItem** dialog and the **WorkItem** pane are tools that are used in order to inspect and edit all WorkItem properties. WorkItem dialog is a separate modeless window, and it is possible to open and edit several WorkItems simultaneously. WorkItem Pane is a panel that is glued to some WorkItem Explorer border usually.

WorkItem dialog can be opened several ways:

- 1) In order to create new **WorkItem**-, You should use **File/New/WorkItem (F7)** menu command for this purpose.
- 2) By double-click or pressing “Enter” key on WorkItem, selected in Data pane of WorkItem Explorer, and Daily and Monthly TimeReport views.
- 3) Using menu command **Actions/Open Selected WorkItem (Ctrl+8)**
- 4) As a result of successful WorkItem lookup by its ID, using menu command **Actions/Open WorkItem by ID (F8)**.
- 5) By selecting from recent WorkItem list using menu command **File/Recent WorkItem/...**
- 6) By using the hyperlink to the WorkItem in external applications like e-Mail agent or Helpdesk.
- 7) Using saved Favorites
- 8) Using shortcuts at the desktop

WorkItem 44021 <Edit Mode>

ID: 44021 Kind: Task Parent: Agile-Team Product (PDC\Agile-Team & Helpdesk) Priority: 4 Status: In Progress

Title: Documentation

Descriptions: Management Time Reports Time Constraints Dimensions Miscellaneous Predecessors Helpdesk History

Originator: Oleg Erjomin

Description: Original Description Analysis Comment Management Comment Implementation Comment Documentation Comment Testing Comment Review Comment

The following documents should be written:

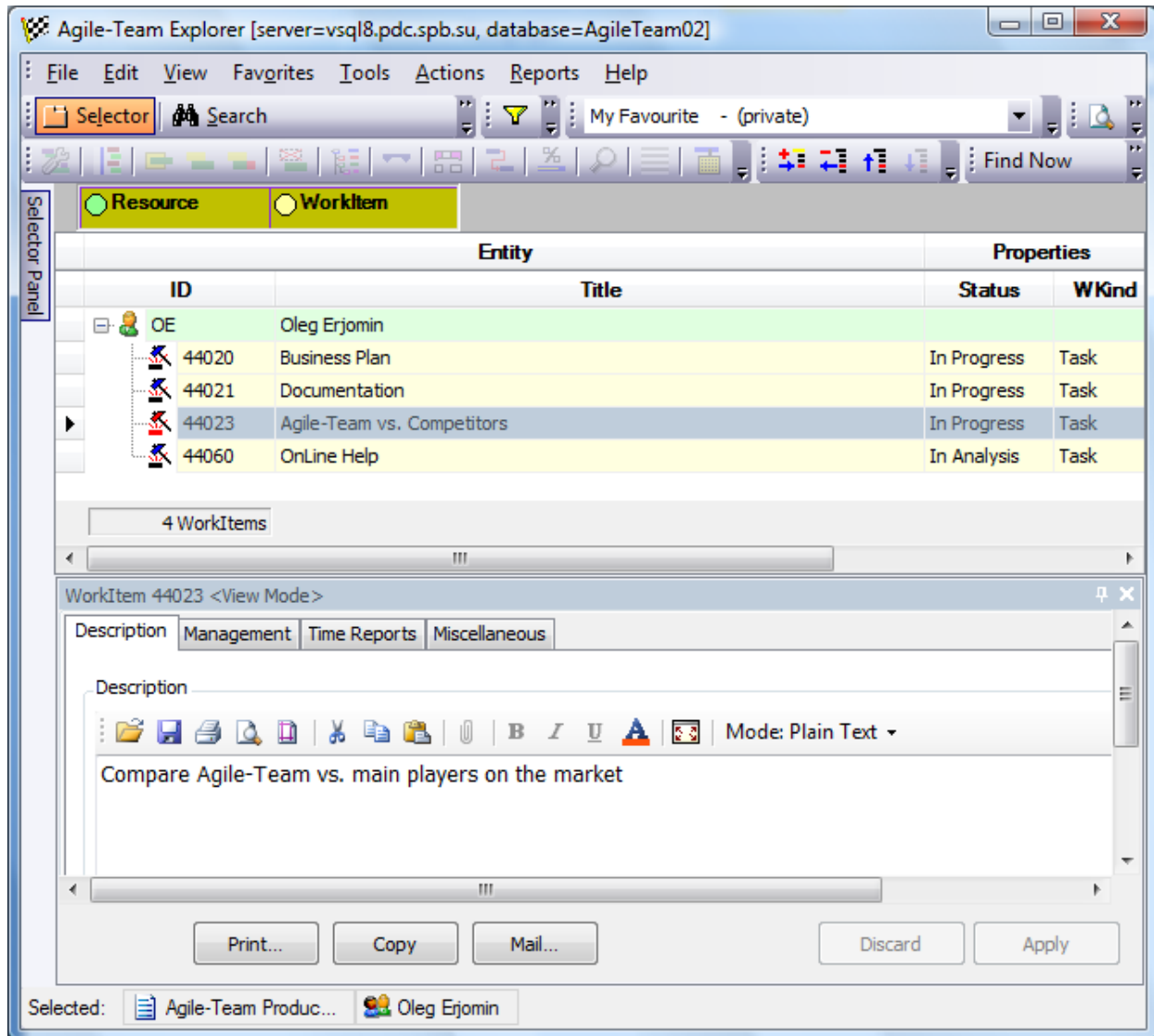
- 1) Installation Guide
- 2) User Manual
- 3) Administrator Guide

Formats:

- On-line Help (.CHM)
- Wiki
- PDF

Buttons: Locate Print... Copy Mail... OK Cancel Apply

In contrast to **WorkItem** dialog, the **WorkItem** pane can be opened only in one way: i.e. using menu command **View/WI Pane (Ctrl+W)**. WorkItem, which is selected in Data pane, will be shown in WI pane. Thus, WI pane is useful to quickly inspect the WorkItems while scrolling through WorkItem list in Data pane.



Both WorkItem dialog and WorkItem pane are fully customizable, and can have various layouts. Usually, WorkItem pane will have simpler layout with several most used controls, and WorkItem dialog will have richer layout to allow inspection and edit all WorkItem properties. See [WorkItem Dialog and WorkItem Pane Layouts](#) for detailed information about layout customization.

Here we will describe WorkItem dialog using examples with predefined layout for BUGs. This layout contains all possible controls. Field controls are grouped in several tabs. Controls can be freely moved from one tab to another.

WorkItem 43171 <Edit Mode>

ID: 43171 Kind: Bug Parent: Sample Project (OE) Priority: 4 Status: Entered

Title: Example BUG

Descriptions Management Time Reports Time Constraints Dimensions Miscellaneous Predecessors Helpdesk History

Originator: Oleg Erjomin Version Appear: <NOT USED> Platform: <NOT SET> Error Severity: <NOT SET>

Example Exists In:

Description Original Description How To Reproduce WorkAround Analysis Comment Management Comment Implementation Comme

Mode: MS Word

This is a sample WorkItem, created in order to describe all controls of WorkItem dialog

Locate Print... Copy Mail... OK Cancel Apply

General Fields

ID	Unique identifier of the WorkItem
Kind	WorkItem Kind. Kinds of WorkItem are: Bug, Task, Issue, Question, and Note
Parent	Parent WBS Item
Priority	WorkItem priority level from 1 to 9
Status	Status of the WorkItem. It can be one of the following: Entered, InAnalysis, Analyzed, InProgress, InReview, Pending, Obsolete, Closed, Done, or Inactive
Title	WorkItem Title, up to 255 characters

Descriptions Tab

WorkItem can contain a number of Descriptions. Descriptions are documents that outline various aspects of WorkItem. Agile-Team provides the following description set:

Description	Description of the WorkItem: what is a problem, what work should be done, etc. If the WorkItem is created ~~form~~ from Helpdesk system, then this field will contain hyperlink to appropriate Helpdesk's issue.
Original Description	Usually contains the description of a problem, like it was get from originator by e-Mail, from Helpdesk, or from ~~an~~ other sources.
Analysis Comment	The result of the analysis of a problem. It can include: investigations of which works are required to implement the WorkItem, understanding how these works should be done, estimation of approximate times required to accomplish these works.
Implementation Comment	How the WorkItem was implemented. Can contain links to the affected files, source code fragments, and ~~an~~ other important implementation notes.
Management Comment	This description field can contain some comments about the management. For example: why some Resource are assigned, why the WorkItem is closed, etc.
Testing Comment	This field outlines test cases for the WorkItem.
Documentation Comment	Notes about how the WorkItem should be documented.
Review Comment	This field contains the results of review of the WorkItem. We recommend its use ~~it~~ when the review is negative and WorkItem is returned from Tester to Developer.
How to Reproduce	This field is often used in case the WorkItem has some kind of Bug . It describes the steps ~~7~~ that reproduce the problem.
Workaround	If the Bug is analyzed ~~7~~ and is planned to be fixed in future product versions, but some workaround is known, then this field describes the procedures that may help users to overcome the existing problem.

Agile-Team supports three document formats for using as descriptions: **Plain Text**, **Rich Text Format (RTF)** and **Microsoft Word Documents (MS Word)**. The document format can be switched using "Mode" drop-down menu at the editor's toolbar. The default editor mode is defined in "[Local User Options](#)" dialog.

Editor is controlled using its local toolbar. This toolbar contains shortcuts for file, printing and clipboard operations. In addition, in RTF mode simple formatting operations are available. In MS Word mode, all features of this famous text processor are available.

The following additional properties are accessible through **Description** tab:

Originator	This property is used to set who is has originated the WorkItem.
Version Appear	For Bugs kind of WorkItems in this list button, you should select the earliest Product Version in which the bug is detected. This Version is displayed in the bug description of the WEB Knowledge Base.
Platform	In this list button you should select OS under which the bug is detected
Error Severity	In this list button you should select one of the following levels of the error importance: Critical - Bugs having serious influence on the product usage, usually errors of this type should be fixed in the nearest release. Unlikely Critical - Bugs having not so serious influence on the product usage, usually errors of this type should be fixed in one of the nearest releases. Normal - All other not so important errors. Some of them, if they have workarounds, can be simply documented in WEB Knowledge Base and fixing them can be delayed
Example Exist In	Here you can explicitly specify a path to a file or directory in which you placed an example demonstrating this bug.

Management Tab

WorkItem 43171 <Edit Mode>

ID: 43171 Kind: Bug Parent: Sample Project (OE) Priority: 4 (Low) Status: In Progress

Title: Example BUG

Descriptions Management Time Reports Time Constraints Dimensions Miscellaneous Helpdesk Predecessors History

Activity	Active	Resource	Used	Estimated	Rest	Total	Done
Analysis	☐	Oleg Erjomin	1,00	☐	0	1,00	☒
Implementation	☒	Elena Lisnenkova	15,00	☒	10,00	25,00	☐
Documentation	☐	<NOT SET>	0	☐	0	0	☐
Testing	☐	<NOT SET>	0	☐	0	0	☐
Review	☐	<NOT SET>	0	☐	0	0	☐
Totals:			16		10	26	

☐ Obsolete Active State: Active Budget: 0 Version Done: <NOT USED>

Locate Print... Copy Mail... OK Cancel Apply

Properties that are by default grouped at this tab are used to control WorkItem state and workflow. The most important part of this page is Activity control sheet. It contains six rows: one for each type of Activity. Each row contains the following controls:

- Activity** Displays the Name of Activity.
- Active** This flag is used to Activate or Deactivate the Activity. Time can be reported only on Active Activities.
- Resource** You can select the Resource or Group that will be assigned on this Activity.
- Used** Read-only field that is used in order to display time spent on this Activity. It is a sum of all time reports on this Activity.
- Estimated** This flag shows that the time being spent on this Activity is estimated. If this flag is OFF, than Rest will be set to Zero.

Rest	Initially in this control should be specified the number of hours, which is planned for implementation of the Activity. After this the value displayed in the control is automatically handled by Agile-Team. As soon as a Resource reports some hours onto implementation of the Activity, the displayed number is reduced onto the reported number of hours.
Total	The value displayed in this control is automatically handled by Agile-Team. Initially it is set equal to the initial value planned in the Rest control. After this the control is automatically handled by Agile-Team. The value in this control is handled equal to the <i>Rest + Used</i> . Note that it is not changed until the Rest value is manually changed by the user.
Done	When implementation of an Activity is accomplished, then this check box should be checked ON. Notice that when it is checked ON, then all other controls of the Activity are disabled. Notice that you can uncheck this check box, thus marking the Activity as “not Done”.

Agile-Team workflow is almost free. You can freely activate and deactivate any activities within WorkItem, except of “**Analysis**”.

“Analysis” activity can be activated only if there are not any other active Activities. Also, if you want to mark “Analysis” activity “not Done”, you should deactivate all another Activities for current WorkItem.

There is a “Totals” row under the Activities control sheet. **Used**, **Total** and **Rest** columns are summed here.

Other controls at **Management** Tab are:

Obsolete	Indicates whether the WorkItem is marked Obsolete .
Active State	This listbox is used to set the active state of the WorkItem. It can be: Active, Inactive, or Closed . You can spend time only for active WorkItems.
Budget	Budget Time, allocated for the WorkItem.
Version Done	Version where the WorkItem is implemented. This field is enabled only for WorkItems with finished Implementation Activity. If the Product branch for the Project is specified, then Agile-Team can set this value automatically to the last version in that branch.

Time Reports Tab

WorkItem 43171 <Edit Mode>

ID: 43171 Kind: Bug Parent: Sample Project (OE) Priority: 4 Status: In Progress

Title: Example BUG

Descriptions Management **Time Reports** Time Constraints Dimensions Miscellaneous Predecessors Helpdesk History

Activity: Analysis Used Time (h): 1,00 Rest Time (h): Total Time (h): 1,00

Report Date \	Creation Time	Activity	Resource	Hours	Comment	Entered By
30.06.2009	30.06.2009	Analysis	Oleg Erjomin	1,00		
30.06.2009	30.06.2009	Implementation	Oleg Erjomin	2,00	Short by descriptive Comment	
30.06.2009	30.06.2009	Implementation	Elena Lisnenkova	4,00		Oleg Erjomin

Locate Print... Copy Mail... OK Cancel Apply

At this page it is possible to report time spent on WorkItem Activities. Main part of this page is occupied by Time Reports grid, which is used to inspect and edit all time reports made for current WorkItem. In order to insert new time report you should press button **“Insert”**. When you want to edit the existing time report, you may press **“Edit”** button, or edit Time Report record in place. In both cases the dialog that is shown at the next picture will appear.

Edit Time Report

Date: 30.06.2009

Activity: Implementation

Resource: Elena Lisenenkova

Total for Activity (h): 16,00

Used for Activity (h): 6,00

Comment:

For day (h): 4,00

Rest (h): 10,00

☐ Set Activity Done

OK Cancel

This **Dialog** and **Time Reports** grid contain the following fields (columns)

Report Date	The date for time report. It is allowed to enter time reports for the past dates.
Creation Time	Date and Time when the time report was created. It is read-only column that is filled automatically.
Activity	The Activity on which the time is reported ↔ .
Resource	This field is used to select Resource, who is reporting the time. It is current user by default, but it is possible to enter time reports on behalf of another users. In the Last case the column “Entered by” will contain the Resource name, who has entered the record.
Hours (For day(h))	This spin editor is used to enter time amount for this report. The default increment step is defined in “ Local User Options ” dialog.
Comments	Usually it contains a short description of a work, that was done during the reported time.

Additionally, the “**Edit Time Report**” dialog contains the following controls:

Total for Activity	Informational field that displays the total time for selected Activity. <i>Total = Used + Rest.</i>
---------------------------	--

Used for Activity

Informational field that shows the time, already spent for the selected Activity. It is the sum of time reports for this Activity.

Rest

Rest time for selected activity. It is allowed to change the time remaining for selected Activity here. When “Explanation for Time Changing” is set to **Required** for the Project which WorkItem [is](#) belongs to, then additional field for entering the explanation will appear.
If the time entered in Used field exceeds the rest time, then proper warning will appear, and you will be asked for the reason of time exceeding .

Set Activity Done

This flag allows to set the selected Activity “Done”.

The following picture shows the “Edit Time Report” dialog when Rest time has exceeded and it is required to give an explanation for time changing.

The screenshot shows the "Edit Time Report" dialog box with the following fields and values:

- Date: 30.06.2009
- Activity: Implementation
- Resource: Elena Lisnenkova
- Total for Activity (h): 17,00
- Used for Activity (h): 17,00
- Comment: (empty)
- For day (h): 15
- Rest (h): 0
- Reason of changing: Plan time is exceeded
- Set Activity Done: ☐

A warning icon and "-1.00" are displayed next to the Rest (h) field, indicating that the used time exceeds the rest time.

Time Constraints Tab

WorkItem 43171 <View Mode>

ID: 43171 Kind: Bug Parent: Sample Project (OE) Priority: 4 (Low) Status: Done

Title: Example BUG

Descriptions Management Time Reports Time Constraints Dimensions Miscellaneous Helpdesk Predecessors History

First Time Report Date: 30.06.2009 Last Time Report Date: 30.06.2009

Phase: Phase I (Agile-Team)

Earliest Start: Parent Earliest Start Earliest Start: 01.06.2009 Latest Finish: Parent Latest Finish Latest Finish:

Locate Print... Copy Mail... OK Cancel Apply

Time constraints for WorkItem are the same as for Projects.

Phase This field allows selecting the **Phase** for WorkItem.

Earliest Start Defines the date that planning subsystem takes into account as the starting date for WorkItems scheduling. If **Earliest Start** is specified, then WorkItems within selected Project will not be scheduled to start before this date.

Latest Finish Latest Finish is not taken into account for the planning algorithm, but if the calculated Finish is later than **Latest Finish** this field will be marked **red** in the Explorer and seen on the Gantt (conflict areas).

First Time Report Date This read-only field shows the calculated date for the first time report in the selected WorkItem

Last Time Report Date This read-only field shows the calculated date for the last time report in the selected WorkItem

Additionally, at this page you can specify the Product Version where the Bug was fixed, or new feature has appeared. It is possible to specify several versions in different product branches. It is suitable when

some features are included in different branches. See [Version management](#) for more details about product branching.

If product branch is set for the Project to which the WorkItem [is](#) belongs to, then this field will be set automatically to the current version in this branch when the WorkItem will have “Implementation” activity done.

Dimensions Tab

WorkItem 43171 <Edit Mode>

ID	Kind	Parent	Priority	Status
43171	Bug	Sample Project (OE)	4	Done

Title: Example BUG

Dimensions Tab:

Dimension	Value
Part	Release 1 (Agile-Team)
Customers	<NOT USED>
Countries	<NOT USED>

Dropdown for Countries:

- <Set inherited value>
- <NOT USED>
- Austria
- Belgium
- Denmark
- England
- Finland
- France
- Germany
- Italy

Buttons: Locate, Print..., Copy, Mail..., OK, Cancel, Apply

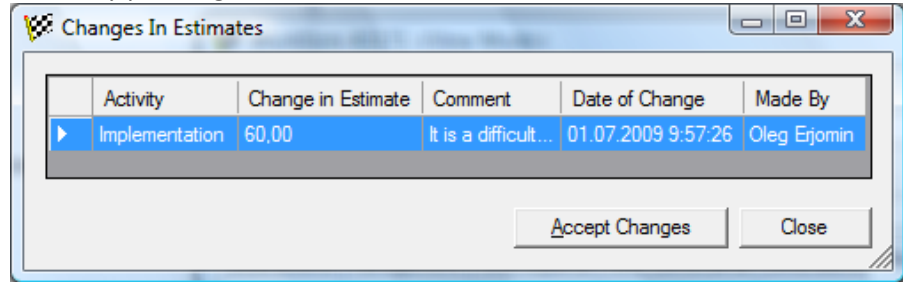
This tab contains Part and user-defined Dimensions, which are (can be) linked to this WorkItem. Usually, WorkItems inherit their Part and Dimensions from parent projects, but you may want to override it.

Miscellaneous Tab

This page unites fields for editing less significant WorkItem properties.

Manager	This field allows assigning the Manager for WorkItem by choosing Resource from the drop-down tree.
External ID	In this field you can type in any string value. This External ID can be used to connect WorkItem with other systems.
Created By	This field displays the Resource who created the WorkItem
Creation Date	Date of creation of the WorkItem
Require Comments for TimeReport	This option can have Required or Not Required values. When Required is specified, then Agile-Team will require short comment on each Time Report.
Changes in Estimates	When a user changes an initially estimated Rest time for an Activity during time reporting, Agile-Team registers that “changes in estimates” occur.

This will be flagged in the **ManageNeeded** column in WorkItems Explorer and “Changes in Estimates” button will be enabled and colored **red**. Manager can inspect changes and accept it using the dialog that will be shown by pressing of this button.



Make Available for Time Reporting

By default, Activities, which are not assigned to the Resource (and onto which no TimeReport are asserted by the Resource), are not seen in the TimeReport Monthly view for this Resource. The **Make Available for Time Reporting** command enforces the TimeReport Monthly view to display all Active Activities from this WorkItem (even when they are not assigned to the Resource).

WBS Number

This field is used in order to set a unique WBS number for the WorkItem.

Get Free WBS Number

By pressing of this button you will get the first free WBS number in current WBS tree branch.

Predecessors Tab

WorkItem 44060 <View Mode>

ID: 44060 Kind: Task Parent: Agile-Team Product (PDC\Agile-Team & Helpdesk) Priority: 4 Status: In Analysis

Title: OnLine Help

Descriptions Management Time Reports Time Constraints Dimensions Miscellaneous **Predecessors** Helpdesk History

Predecessors

- [44021] Documentation

Add Delete

Locate Print... Copy Mail... OK Cancel Apply

This page is used to control the list of predecessors for current WorkItem. Only immediate predecessors are shown here. In order to investigate all predecessors use Gantt view.

You have options to **Add** and to **Delete** predecessors for the current WorkItem.

Helpdesk Tab

The screenshot shows the 'WorkItem 43171 <Edit Mode>' window. At the top, there are fields for ID (43171), Kind (Bug), Parent (Sample Project (OE)), Priority (4), and Status (In Progress). Below these is a Title field containing 'Example BUG'. A tabbed interface at the bottom includes 'Descriptions', 'Management', 'Time Reports', 'Time Constraints', 'Dimensions', 'Miscellaneous', 'Predecessors', 'Helpdesk' (selected), and 'History'. The 'Helpdesk' tab contains a 'Different Title' field with 'Unexpected Result for Multiplying of 100 000 by 100 000' and a 'Publish' checkbox. Below this is an 'Article Text' field with a rich text editor toolbar (font, size, bold, italic, underline, color, background color, bulleted list, numbered list, link, unlink, indent, outdent) and the text: 'Multiplication of 2 big integers gives a random result instead of the overflow exception. For example, multiplying of 100 000 by 100 000 gives 1410065408.' At the bottom of the window are buttons for 'Locate', 'Print...', 'Copy', 'Mail...', 'OK', 'Cancel', and 'Apply'.

Helpdesk page is used to give public description for the WorkItem. It will be used in Knowledge Base and Product Update Notes. Thus, the WorkItem will produce Knowledge Base article. You can give alternative title for the article, which will override WorkItem title.

The article text is edited in HTML editor, which has **two** modes:

Design – WYSIWYG HTML Editor

HTML Source – it is a plain text editor, which allows full control over native HTML code of the document.

HTML editor supports basic formatting and clipboard operations. You can insert hyperlinks and images in the document.

Note, that in order to display images, you need to set up the URL for Agile-Team Web Service in [“Global Options”](#) dialog.

History Tab

The **History** tab records track of all important changes, which were made for a WorkItem.

When changed	Who changed	Activity	What is changed	New value
01.07.2009 13:57	Oleg Erjomin	Implementation	Rest time	80.00
01.07.2009 13:56	Oleg Erjomin		"Accept Changes" button	Accepted
01.07.2009 13:56	Oleg Erjomin	Implementation	Rest time	20.00
01.07.2009 13:56	Oleg Erjomin		Description	<MS Word>
01.07.2009 13:55	Oleg Erjomin	Implementation	Rest time	9.50
01.07.2009 13:55	Oleg Erjomin		Description	<MS Word>
01.07.2009 13:55	Oleg Erjomin		Implemented in Version	<NOT USED>
01.07.2009 13:55	Oleg Erjomin	Implementation	Done	No
01.07.2009 13:55	Oleg Erjomin	Implementation	ActivityState	Active
01.07.2009 13:55	Oleg Erjomin	Implementation	Rest time	3.00
01.07.2009 13:55	Oleg Erjomin		Description	<MS Word>
01.07.2009 13:17	Oleg Erjomin		"Accept Changes" button	Accepted

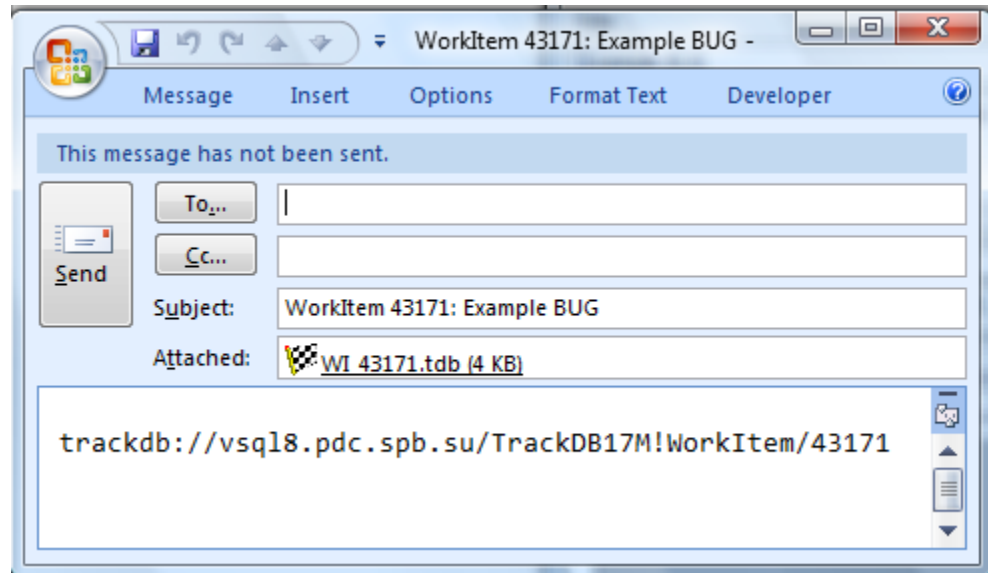
The grid has two pages: **General** and **Time Report History**.

General page displays log for changing of WorkItem properties, and Time Report History shows the log for all changes made with Time Reports.

Common Operations

There are **seven** commands available in WorkItem dialog.

- Locate** In the Project tree this command selects the sub-project directly containing the WorkItem. You can click the Projects tab to see the selected sub-project.
- Print** Activates the dialog in which WorkItem properties can be checked, which should be printed. It prepares the Microsoft Word document that can be edited and printed further.
- Copy** Copies onto the clipboard a short WorkItem description in the following format:
WorkItem ID: **Title**. For example:
WorkItem 43171: Example BUG
- Mail** This command activates your default mailing program with the message prepared as shown in the picture below:



Subject will be ID and Title of the WorkItem.

Attachment will contain the shortcut to the WorkItem. Your addressee can open it simply by opening this attachment.

Message Body will contain URL to WorkItem. This URL can be copied to the browser address bar, sent by e-mail etc.

OK Closes the WorkItem and saves it into the database.

Cancel Closes the WorkItem rejecting all changes, which have been done after the last **saving in the database** operation. WorkItem can be saved manually with the **Apply** button, or automatically. Automatic saving is performed by Agile-Team's concurrency control system (**CCS**) according to the time period, which is set with the [Lock Interval global constant](#).

Attention! The automatic saving operation has the following effect. If the **Lock Interval** period is expired after the last change of the WorkItem was made, then all changes were automatically saved into the database. Therefore, *in this case the **Cancel** command **does not reject any changes!***

Apply Saves all changes into the database without closing of the WorkItem. If the WorkItem dialog was in the **<Edit Mode>**, then this command switches it into the **<View Mode>** and frees the WorkItem data for editing by other users.

Resource Management

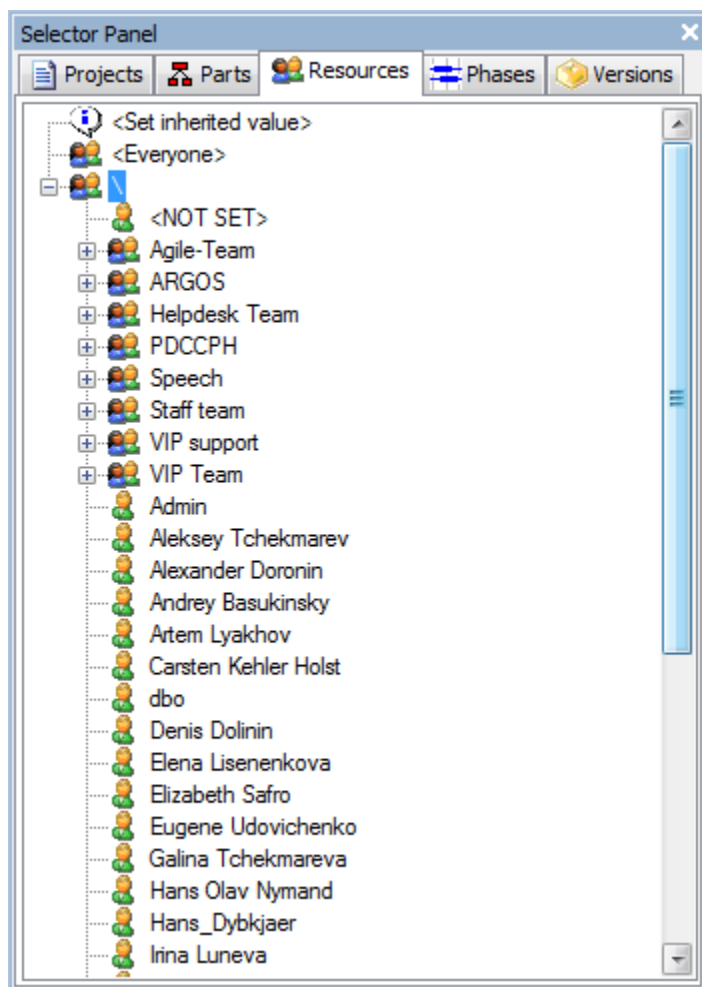
Activities that constitute Projects are carried out by persons. These persons are called Resources. On the one hand, you can think about Resources as else one dimension of the Project model. But on the other hand, the Resources are the entities that serve as foundation for Job allocation, Planning, Permissions, and for many other aspects of Agile-Team.

Usually, each Resource has valid login to the SQL Server, where Agile-Team database is resident.

There is a special Group called <Everyone>. Implicit assumption is that this Group contains all other Resources and Groups.

Each Resource in Agile-Team has an associated Calendar that specifies how many hours he/she should work during the working days of a week. The Calendar also specifies Holidays.

Resources can be organized in Groups. Groups can be created for planning or administration purposes, for example, to assign some activities for several people, or to grant some permission for them. One Resource can be a member of several groups. Also, groups can be members of other groups. Thus, the whole set of Groups and Resources in Agile-Team does not form a tree, but network. However, this network is displayed like a tree in the Agile-Team's Selector pane.



When you select some Resource in this tree, the Data pane will display only Activities that have selected Resource assigned on those Activities, or Resources that reported time on them.

Resource Tree Operations

Operation	Menu command	Shortcut Key	Context menu
Create New Resource	File/New/Resource	Ctrl+Shift+R	Add SubItem (Ctrl+N)
Edit Resource Properties	File/Properties	Enter	Properties
Delete Resource	File/Edit/Delete	Delete	Delete SubItem
Remove Item From Group			Remove Item From Group

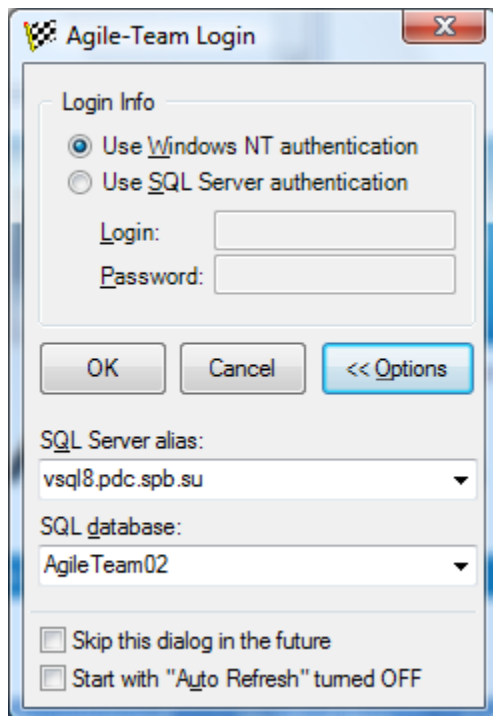
Agile-Team Logins

Almost all Agile-Team Resources are SQL Server Users. Exceptions can include people working remotely (freelancers), and Team Leader reports on behalf of them.

To use Agile-Team, people have to be logged in. Agile-Team supports **two** types of authentication:

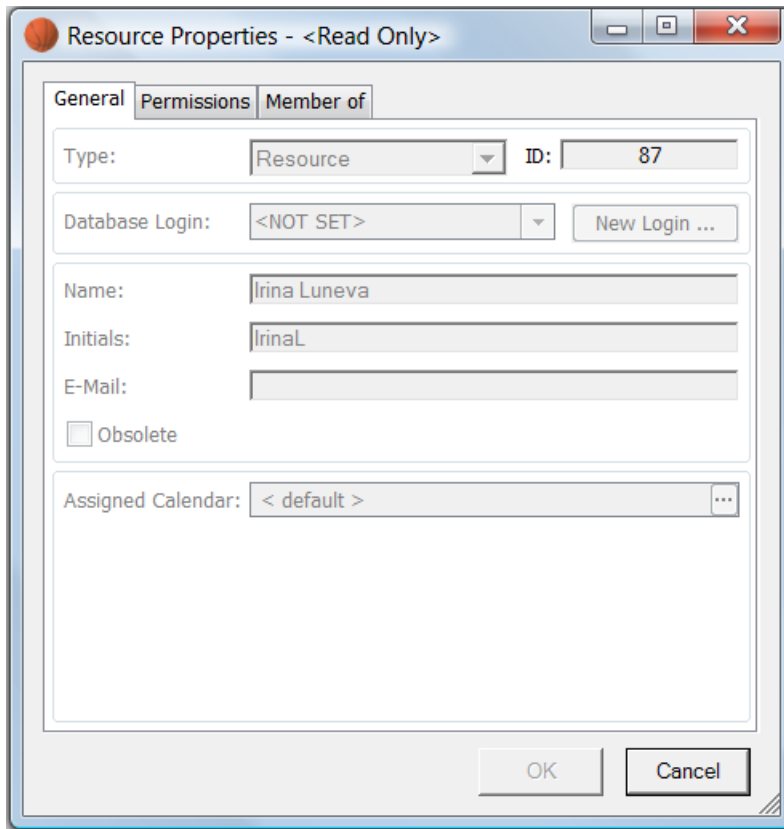
1. **Windows NT authentication** – in this case you don't need to enter your login and password. Agile-Team will use your Windows credentials to login to. It is a recommended authentication method for most users because of its strong security.
2. **SQL Server authentication** – in this case you need to enter your login and password in the Login dialog. This authentication method can be used for users that are not logged in the Windows domain. For example, remote users can use this method. SQL Server authentication is less secure because user's login and password are transferred over network as a clear text.

Agile-Team Login dialog is shown at the next picture.



Resource Property Dialog

When you create a new Resource, or edit properties for an existing one, the Resource Property dialog is used. It has small differences whether it is used for Resource or for Group.

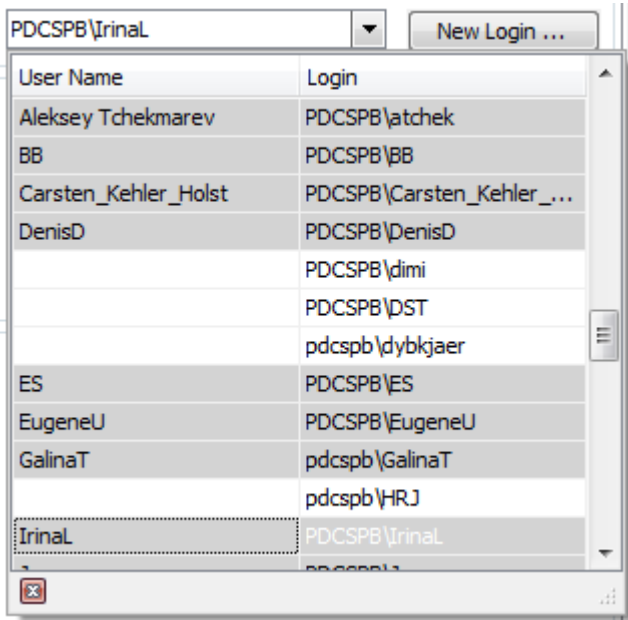


This dialog has **three** tabs: **General**, **Permissions**, **Member of**. The **Group property** dialog has the fourth **Members** tab additionally.

General Tab

The **General** tab contain fields used to display and edit Resource properties.

Type	Informational field that displays a Resource type (Resource or Group)
ID	Informational field that displays an internal Resource Identifier. Can be used in the Query tool.
Database Login	This field is used to set a database login for the Resource. See Agile-Team Logins for information about Login types, used by Agile-Team. When the control is rolled up, it displays the list of Database users and its logins:



Entries corresponding to the logins that are Agile-Team users already are disabled and have the **User Name** column filled. You can choose between logins that are not assigned to the Agile-Team users yet. If you want to have the Resource without a login, for example, for a freelancer, you can choose the **<NOT SET>** entry from this list.

New Login

Press this button if you want to create a new database login. See [how to create new Database Login](#).

Name

Full Name of the Resource.

Initials

Short or Nick name of the Resource. It is used in the **WorkItem Explorer** columns in order to save space. Usually user initials are used to identify a person. For example:
Full name: “Oleg Erjomin”, Initials: “OE”.

E-Mail

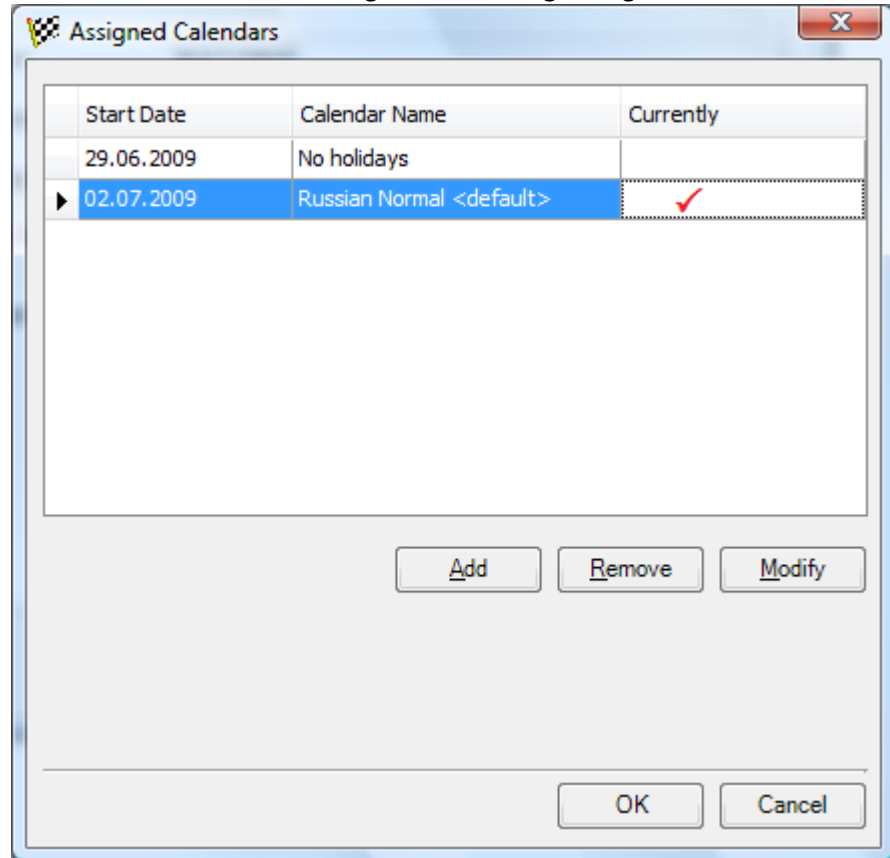
Enter user’s e-mail address in this field. Currently it is informational field only.

Obsolete

Sometimes people retire from the company. But such people can have a lot of WorkItems accomplished, and hundreds of hours in Time Reports. Agile-Team allows deleting only Resource that haven’t Time Reports and are not assigned to any Activity. Other outdated Resources should be set to “Obsolete”.

Assigned Calendar

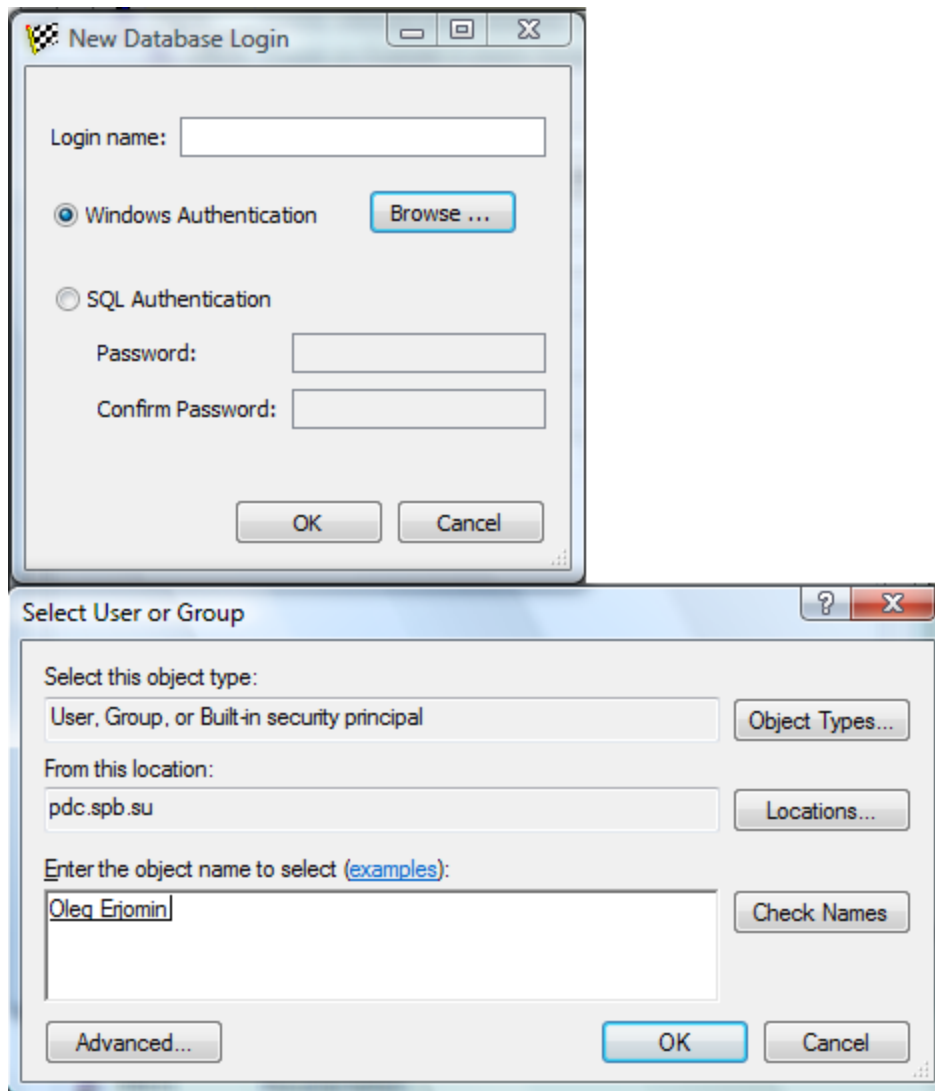
Press this button if you want to change a Resource's Calendar. You can control user's calendars through the following dialog.



This dialog displays the list of calendars assigned to a selected Resource. Each Calendar has a start date. The calendar that is used currently, is marked by a checkmark. See [Calendar Management](#) for more details.

How to Create a New Database Login

When a new Resource is about to be created, you can select him/her database login from an existing one. Possibly this login is used to access another database in your company. If you want to create a new database login, press the **New Login** button in the **Resource Property** dialog. Then the **New Database Login** dialog will appear.

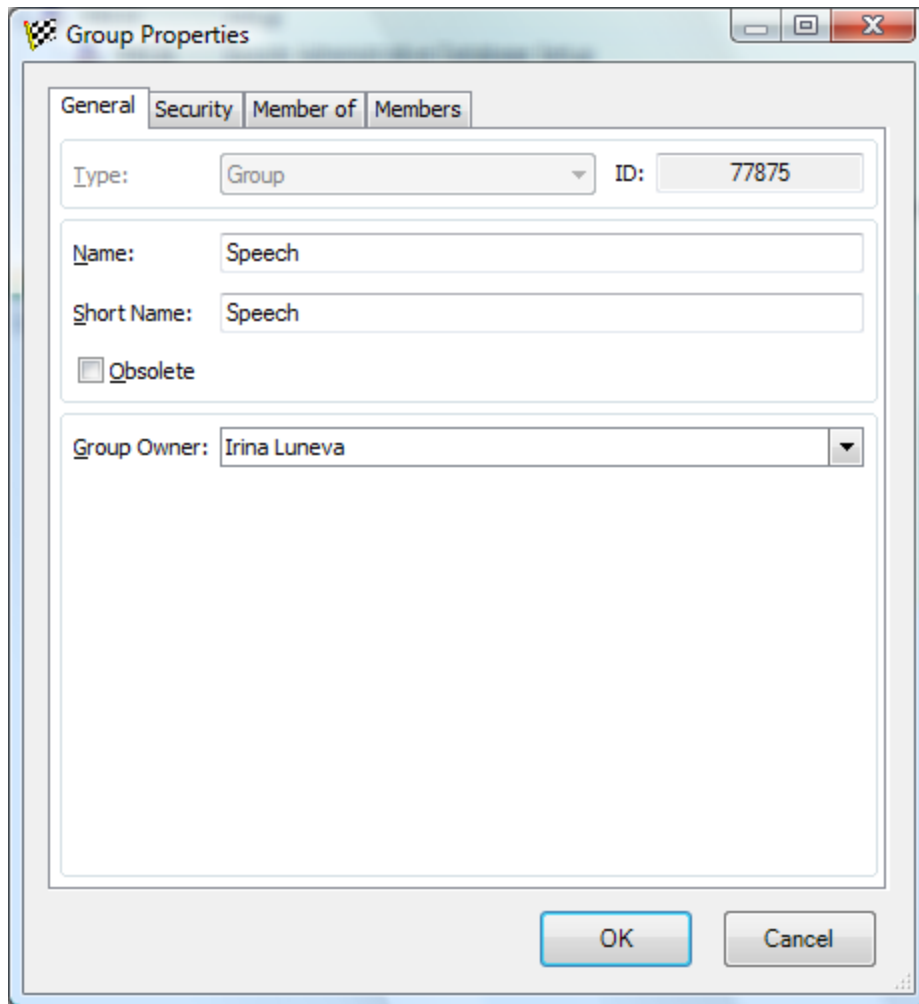


You can choose between Windows or SQL authentication types. In the case with SQL authentication, you will need to enter a new login name and password.

In the case with Windows authentication, you will have to choose an existing Windows Login from the standard **Select User or Group** dialog.

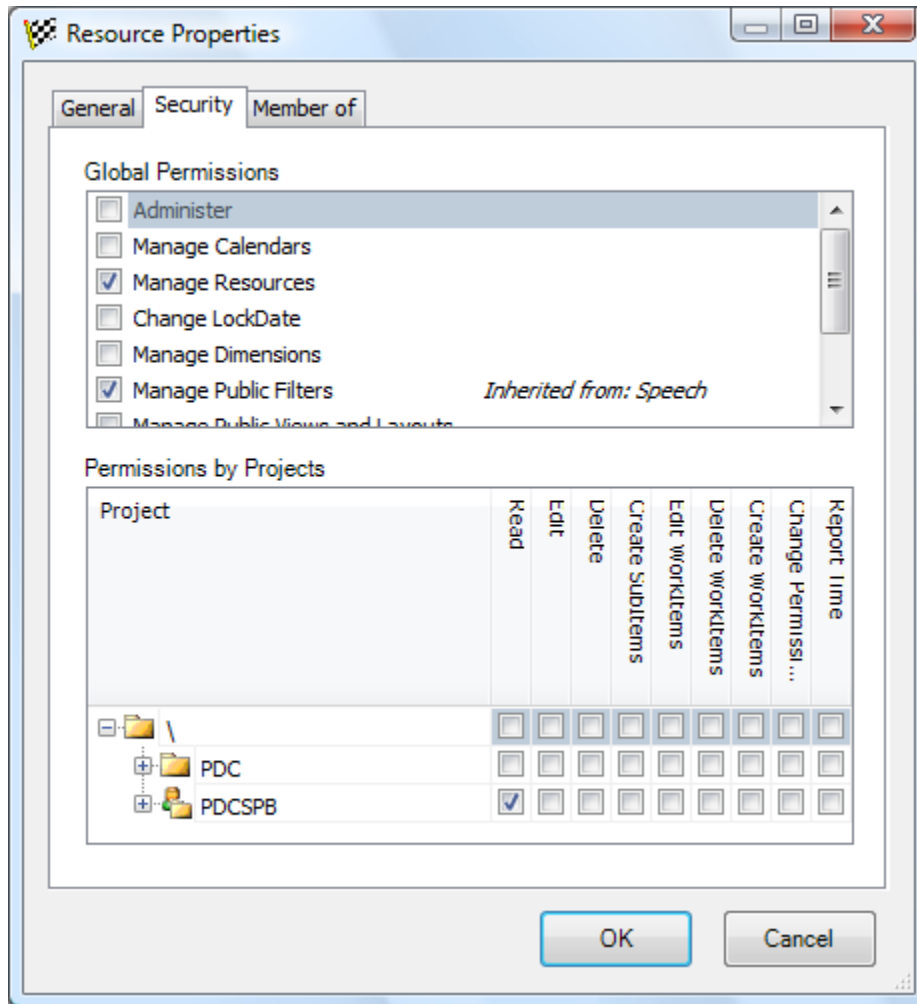
Group Properties

When you edit properties for a Resource Group, the **General** tab of the **Property** dialog looks a little simpler.

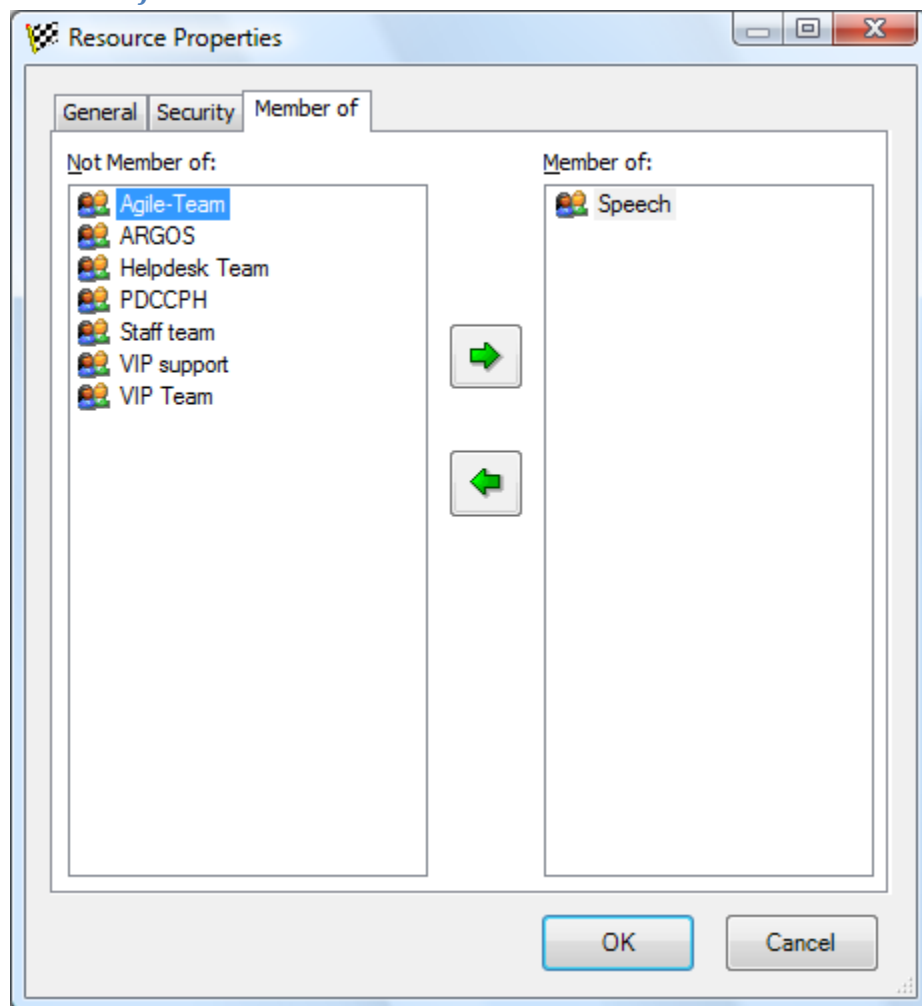


One cannot assign a database login, e-mail address, or a Calendar to the whole Group.

However, you can assign a Group owner. This person will be authorized to control group membership.

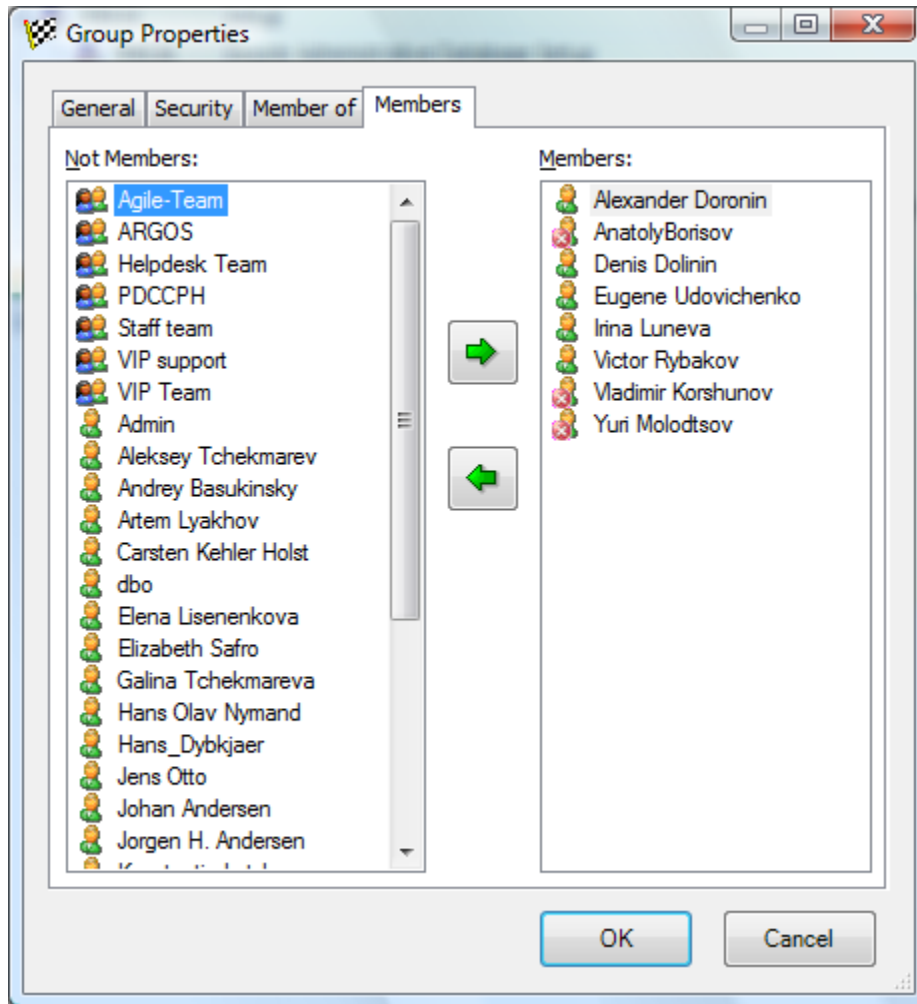
Permissions Tab

You can set Global Permissions and inspect Permission for Projects using this tab. See the [Permission and Roles](#) chapter for information about Agile-Team security concepts.

Member Of Tab

Using this page you can control the Resource membership in Resource Groups. Just use two buttons in the middle of the page to select which Group the Resource is a member of and which is not.

Members Tab



In addition to three tab pages described above, the **Group Property** dialog have one more page: **Members**.

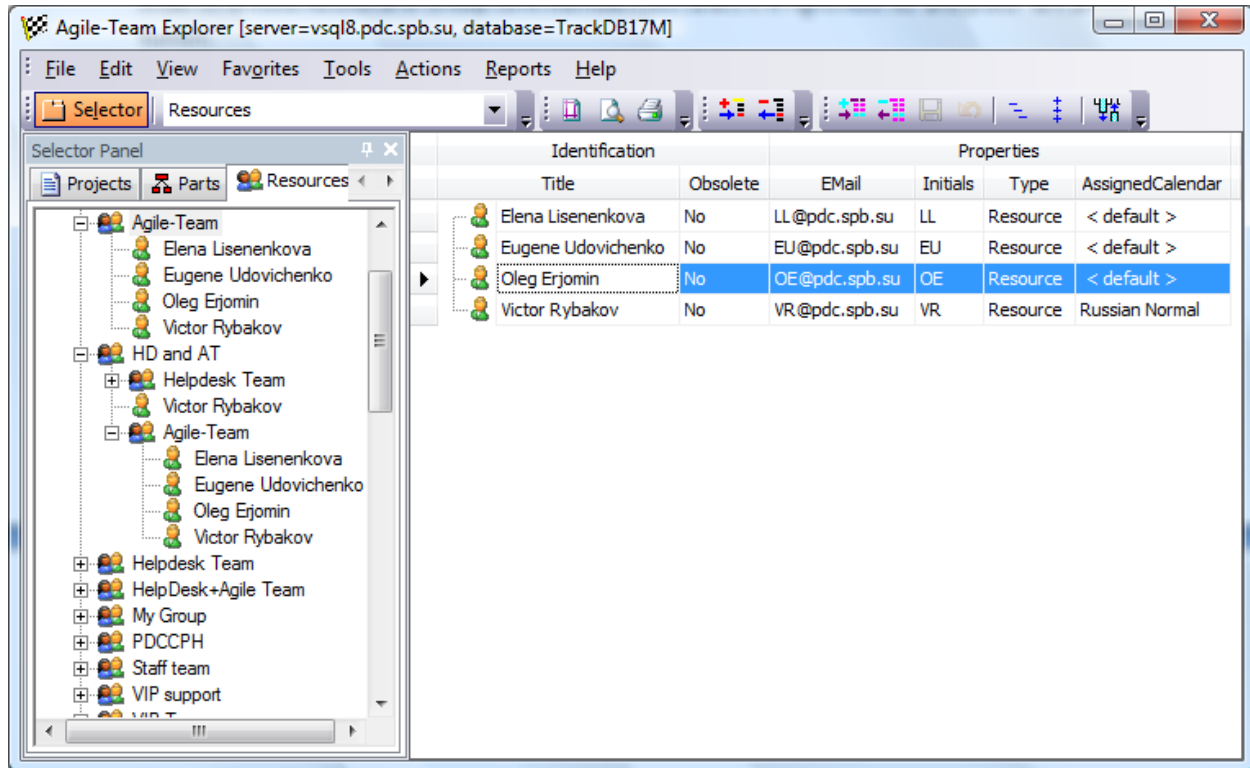
Here you can see what Resources and Groups are members of the current Group. To add a new member, just move the selected Resource or Group from the leftmost list using the right arrow button. In order to remove a Resource or a Group from the list of members just select it in the rightmost list and press the left arrow button.

Resource View

Selecting the **Resources** item in the **Select** or View control of the Main toolbar, you can open the Resource view.

The **Resources** view is a tool for brief overview of all Resources, registered in Agile-Team. Like other views, the **Resources** view contains two panes: **Selector** and **Data Pane**.

Columns in the data pane can display almost all Resource properties. If you wish to modify some property of a Resource, you can simply click on the cell with this property and change its value using data type specific in-place editor.



Double click at the Data view row will invoke the [Resource Property dialog](#), described above.

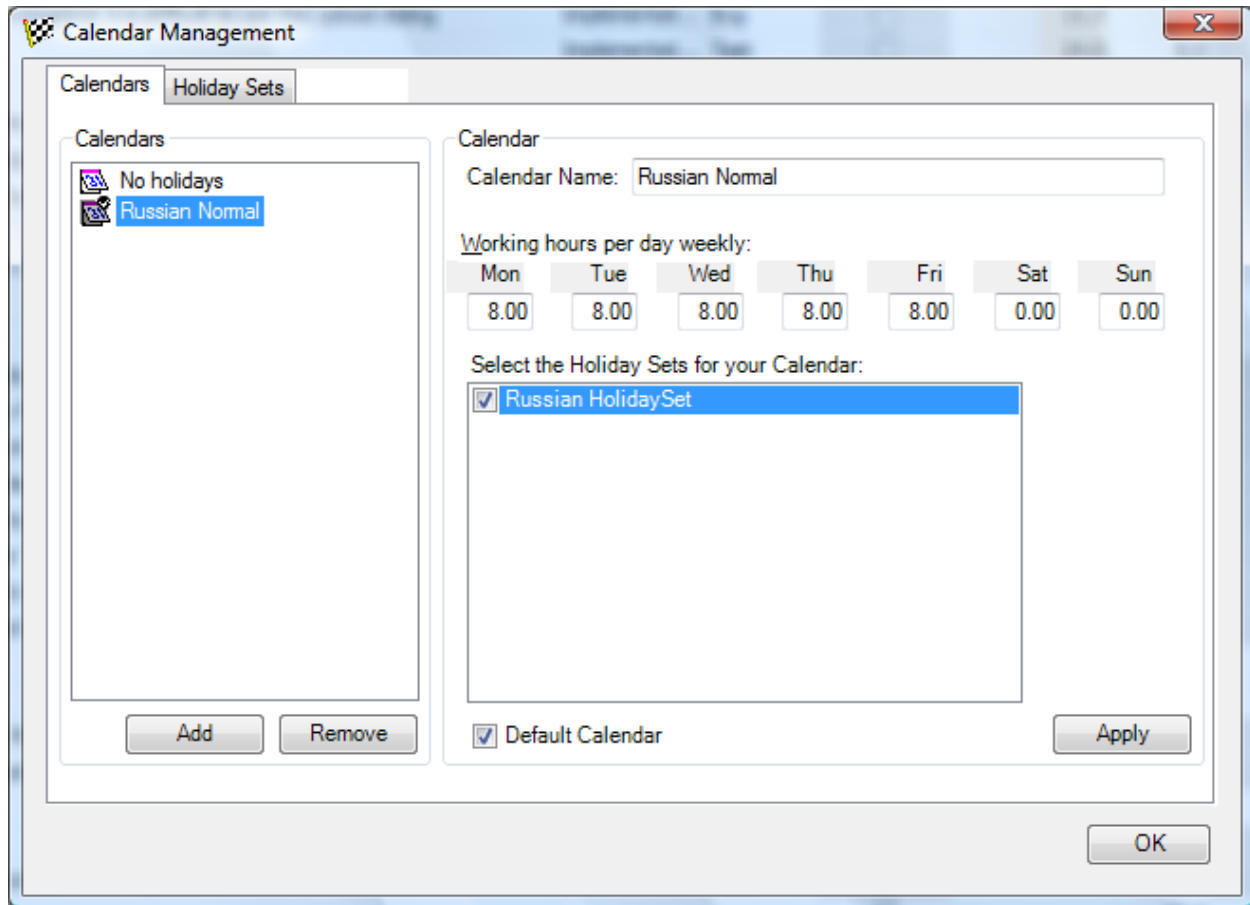
Calendar Management

Calendars are the Agile-Team entity that serves as a basis for Time Reporting. You can have as much calendars as it is needed to describe working schedules of company employees.

At every time period, each Resource has one and only one calendar. But he/she can have various calendars that will be used during specific time periods. For example, say John Doe will work since Jan-01-2009 3 (three) days per week, 6 hours per day, but since May-01-2009 he will work full week, i.e. 5 (five) days, 8 hours per day.

In order to be able to manage Calendars, you should have proper permissions. See "[Global Permissions](#)".

Calendars are controlled using the **Calendar Management** dialog that is invoked with the **Tools/Calendar Management** menu command.



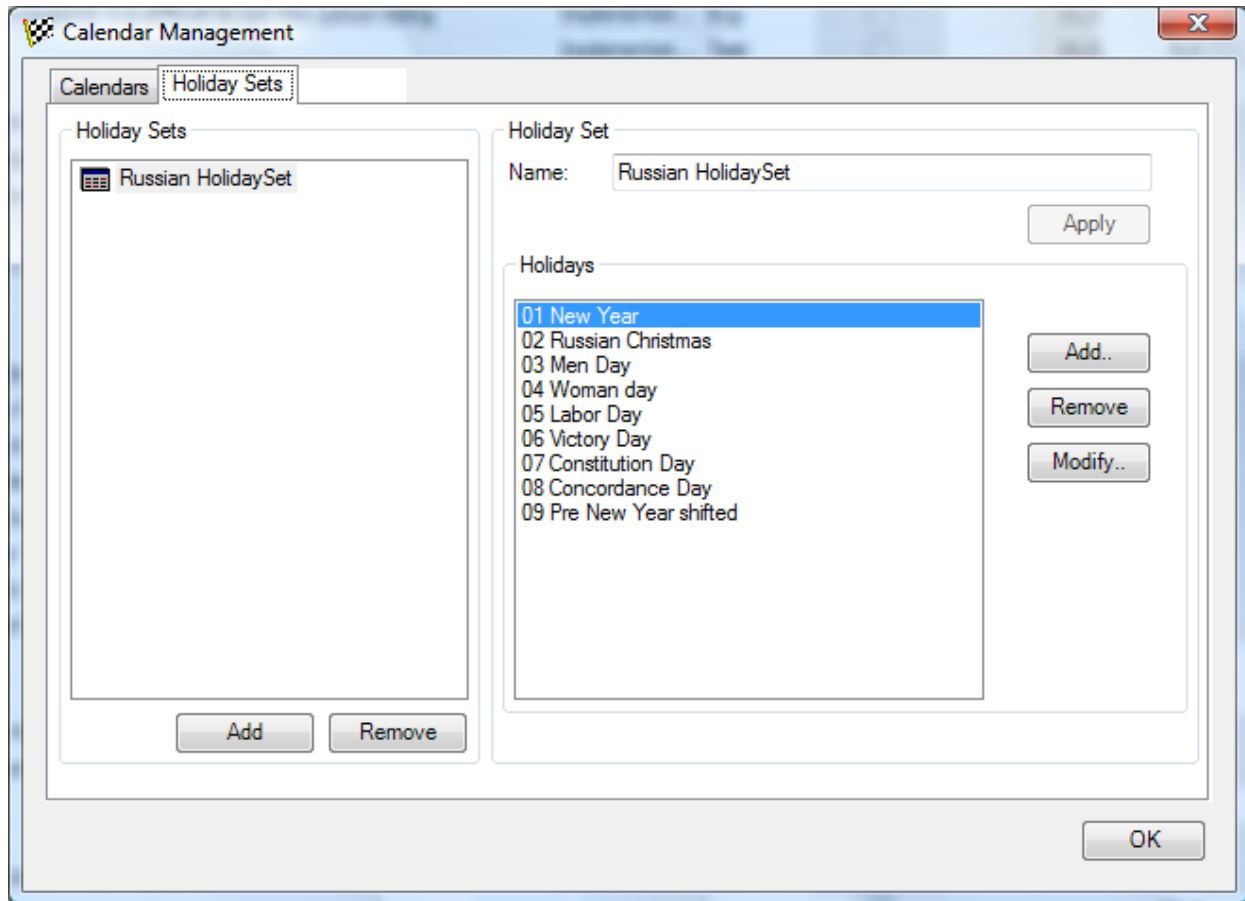
This dialog has **two** pages:

- **Calendars** – this page is used to handle the set of Calendars in Agile-Team;
- **Tools/Calendar Management** – this page is used to define Holidays

At the **Calendars** tab you can:

- Create a new Calendar;
- Delete an existing Calendar;
- Set how many hours an employee can work each day;
- Set whether a selected Calendar is default for all Resources;
- Assign a Holiday set for selected Calendar.

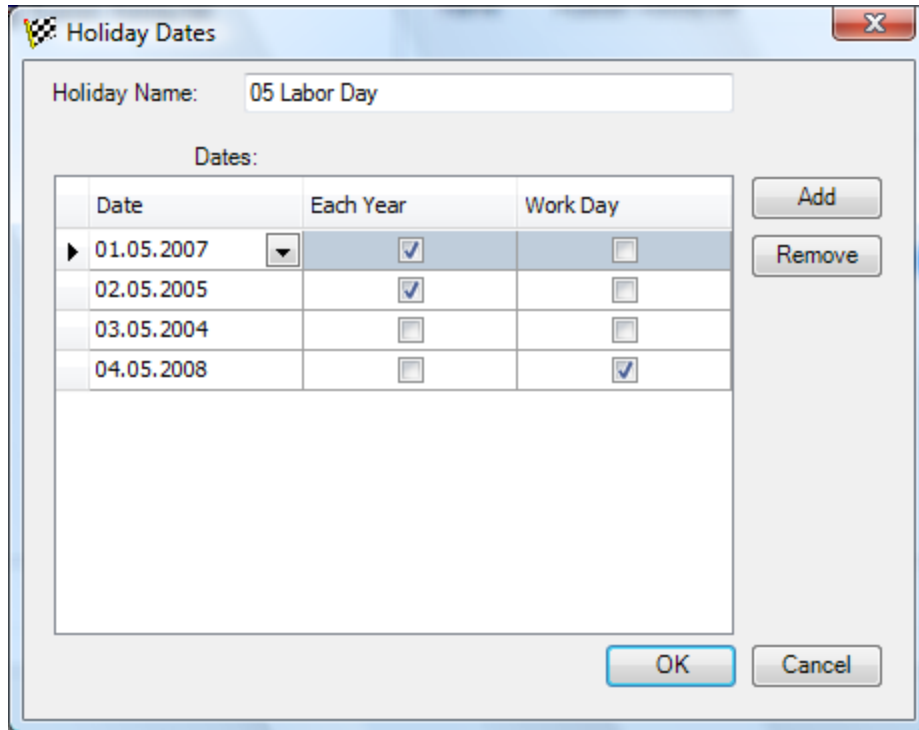
The **Holidays Sets** tab used to define Holidays.



At this page you can browse through registered Holiday sets. You can have as much holiday sets as you need. It is because your employees can live in different countries; belong to different religions, etc.

For each Holiday set, you need to define days that are holidays (out-of-work). As standard national holidays, so can any customized holidays be created.

When you press the **Add** or **Modify** button to append a new Holiday, or edit an existing one, the following dialog will appear:



Here you can define holiday dates. For each day you can specify whether it is repeated at the same date annually, or it can be at another date. Also you can set that some date in a specific year will be a working day, even though this date is a holiday in other years.

For example, according to Russian laws: If some national holiday occurs on Saturday or Sunday, this holiday can be shifted to Monday, Tuesday, etc.

Reporting the Time

Time Reporting is one of the core elements of Agile-Team. A comprehensive and accurate time recording is one of the most important features of the system, which identifies the number of competitors.

Time Reporting can be initially seen as only a disadvantage (unneeded extra task) to the people doing the work, but it has great advantage for a bigger picture. Working time is the main resource determining how expensive a project is, there should not be more time spent on the Project than it was agreed upon. Without Time Reporting, it is difficult to keep track of Projects, and without Time Reporting it is difficult to follow-up and improve for future Projects.

Planning facility uses Time Reports for calculations of the time rest for each activity.

Time Reporting are normally done from the **TimeReport Daily** or **TimeReport Monthly** views, but it is also possible to open the **WorkItem** dialog, and report time therein the **Time Reports** tab.

In Agile-Team Resources are assigned to Activities. Before implementation of Activities starts, approximate time for these implementations should be estimated, and time is reported namely on Activities.

When doing time reporting, it is possible to give a comment for each Time Report. The **Comment** field can give a further description of the work onto which the time is reported.

When time is reported, the **Rest** time is automatically decreased to adjust the **Total** time and the **Used** time values. If the planned **Rest** time occurs too small to implement all needed works, then a new bigger **Rest** time value should be entered.

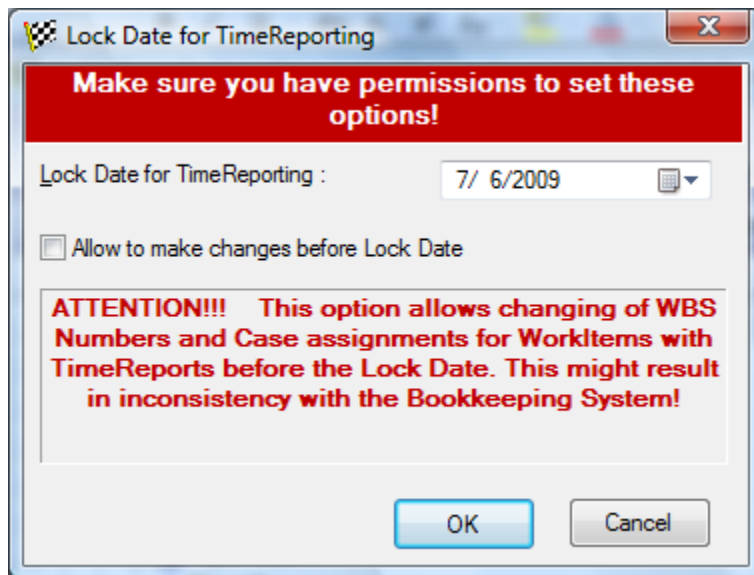
Permissions for Report Time

Not all Resources can report time on every Activity. There is a special permission Report time, that allows a specific Resource to report time on WorkItems that belong to a Project with this permission set ON. See "[Permissions for Dimension Access](#)", [Project Permissions](#).

Last Date for Changes to Time Reports

In many companies, Time Reports periodically, say once a month, are transferred to bookkeeping systems. Then some invoices are created, basing on these Time Reports. After this is done, it should not be possible to add or modify Time Reports for this time period.

To control this, Agile-Team implements **Lock Date for TimeReporting**. When **Lock Date for TimeReporting** is set, then it is not possible to add/delete any Time Reports, or do any changes to existing Time Reports before this **Lock Date**.



Only the person responsible for transferring these Time Reports to other systems should be granted permission to set this **Lock Date**. See [Global Permissions settings](#) for information on how to set such permission.

What Activities Are Available for Time Reporting

Both **Daily** and **Monthly** Time Report views show only the Activities that are available for time reporting for a selected Resource. This set of activities includes:

- Activities that are assigned to a selected Resource and have the **Active** state;
- Activities that are made available for time reporting;
- Activities that were previously reported by a selected Resource for a selected time period (day or month);

For example, look at the WorkItem 44114 at the picture below. Only the **Implementation** activity will be included in the Time Report **Daily** view.

WorkItem 44114 <Edit Mode>

ID: 44114 Kind: Task Parent: [44105] Setup for Web Application (PDC\Agile-Team ... Priority: 3 Status: In Progress

Title: There are some hard-coded links in HelpDesk

Descriptions Management Time Reports Time Constraints Dimensions Miscellaneous Predecessors Helpdesk History

Activity	Active	Resource	Used	Estimated	Rest	Total	Done
Analysis	☐	Oleg Erjomin	0.00	☐	0	0.00	☒
Implementation	☒	Oleg Erjomin	0.00	☐	0.00	0.00	☐
Documentation	☐	Oleg Erjomin	0.00	☐	0	0.00	☐
Testing	☐	Oleg Erjomin	0.00	☐	0	0.00	☐
Knowledge Base	☐	<NOT SET>	0	☐	0	0	☐
Review	☒	Victor Rybakov	0	☐	0	0	☐
Totals:			0		0	0	

☐ Obsolete Active State: Active Allocated Time: 0

Locate Print... Copy Mail... OK Cancel Apply

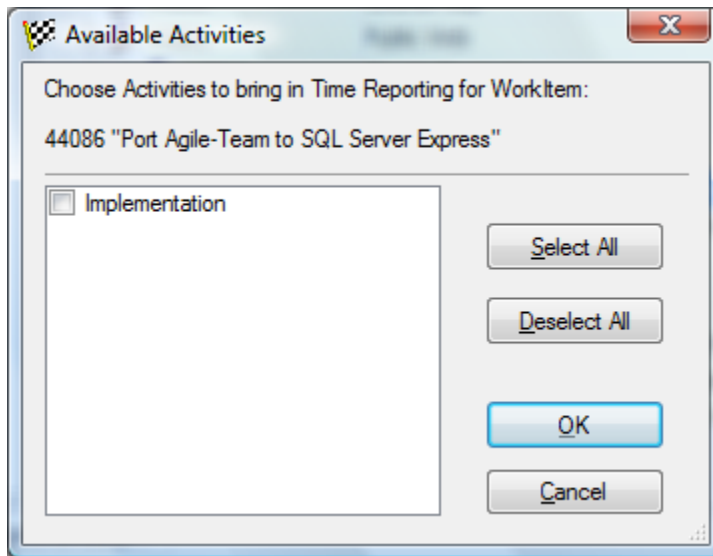
The **Analysis** activity is not included, because it has the **Done** state. The **Documentation** and **Testing** activities are not included, because they are not activated yet. The **Review** activity is not included, because it is assigned to another Resource.

How to Make Activity to be Available for Time Reporting

Often there is a need to allow some user to report time on Activities that are not assigned to him/her. This can be done in **two** ways:

1. Select the WorkItem, which you wish to be available for Time Reporting. Choose the **Make Available for Time Reporting** command from the context menu.
2. Enter the WorkItem ID in the dialog window that appears on the **Actions/Make WorkItem available for Time Reporting by ID** menu command.

In the dialog, shown at the picture below, you need to select which Activities will be brought in Time Report view.



You can dismiss activities from Time Reporting with the **Dismiss WorkItem from Time Reporting** context menu command.

How to Save Time Report

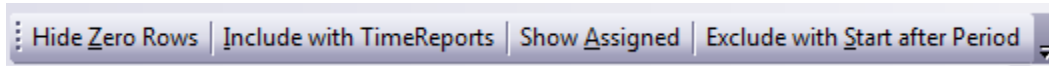
You can save or discard changes made in the TimeReport using commands shown in the table below. You can set the **AutoSave** mode for the **TimeReport** view also. In this case, changes will be saved automatically, when input focus will leave the **Cell** editor.

Operation	Menu Command	Shortcut Key	Toolbar button
Save Updates	File/Save Updates	Ctrl+S	
Discard Changes	File/Cancel Updates		
AutoSave when exit cell editor			

How to Hide / Show Activities in TimeReport Views

The list of Activities, available for Time Reporting may be rather long. Agile-Team offers several immediate filters in order to show only desired part of this list.

These filters are located in the **View** menu and at the **Daily and Monthly View** toolbars.

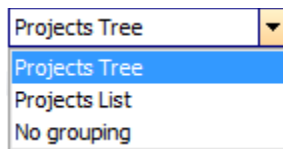


Command	Action
Hide Zero Rows	If this check button is “ON”, then only the reports that are asserted during the selected date will be shown.
Include with TimeReport	If this option is ON, then Activities with time reports that were asserted previously will be shown as well.
Show Assigned	This option is used to show Activities that are assigned for the selected Resource.
Exclude with Start after Period	This option is used in order to hide the Activities that are planned to start after the selected date.

Note, that the activities that are brought in time reporting, will be shown always, except of the case when reported **Used** time is 0 hr, and the **Hide Zero Rows** option is OFF.

Activities Grouping

Activity grouping in the **TimeReport** views is controlled by toolbar’s listbox.



There are **three** grouping modes available:

Project Tree

The **Title** column displays a Project subtree from the root down to the project node to which selected Activities belong. The **Project** column is hidden.

Title	
PDC	
Agile-Team & Helpdesk	
HelpDesk	
Agile-Team	
Agile-Team Product	
Business Plan	
Documentation	
Agile-Team vs. Competitors	
OnLine Help	
Public Web	
Create Content	
Choose CMS	
Icons for Agile-Team	
Port Agile-Team to SQL Server Express	
Theare are some hard-coded links in HelpDesk	

Project List

The **Title** column displays selected Activities grouped by Project nodes to which those Activities belong. The Project nodes are shown with full path from the root. The **Project** column is hidden.

Title	
PDC\Agile-Team & Helpdesk\Agile-Team Product	
Business Plan	
Documentation	
Agile-Team vs. Competitors	
OnLine Help	
Public Web	
Create Content	
Choose CMS	
Icons for Agile-Team	
Port Agile-Team to SQL Server Express	
Theare are some hard-coded links in HelpDesk	

No grouping

All Activities are shown as plain list without any grouping applied. **Project** column displays full path from the root down to the Project node to which the Activities belong.

Activities Sorting

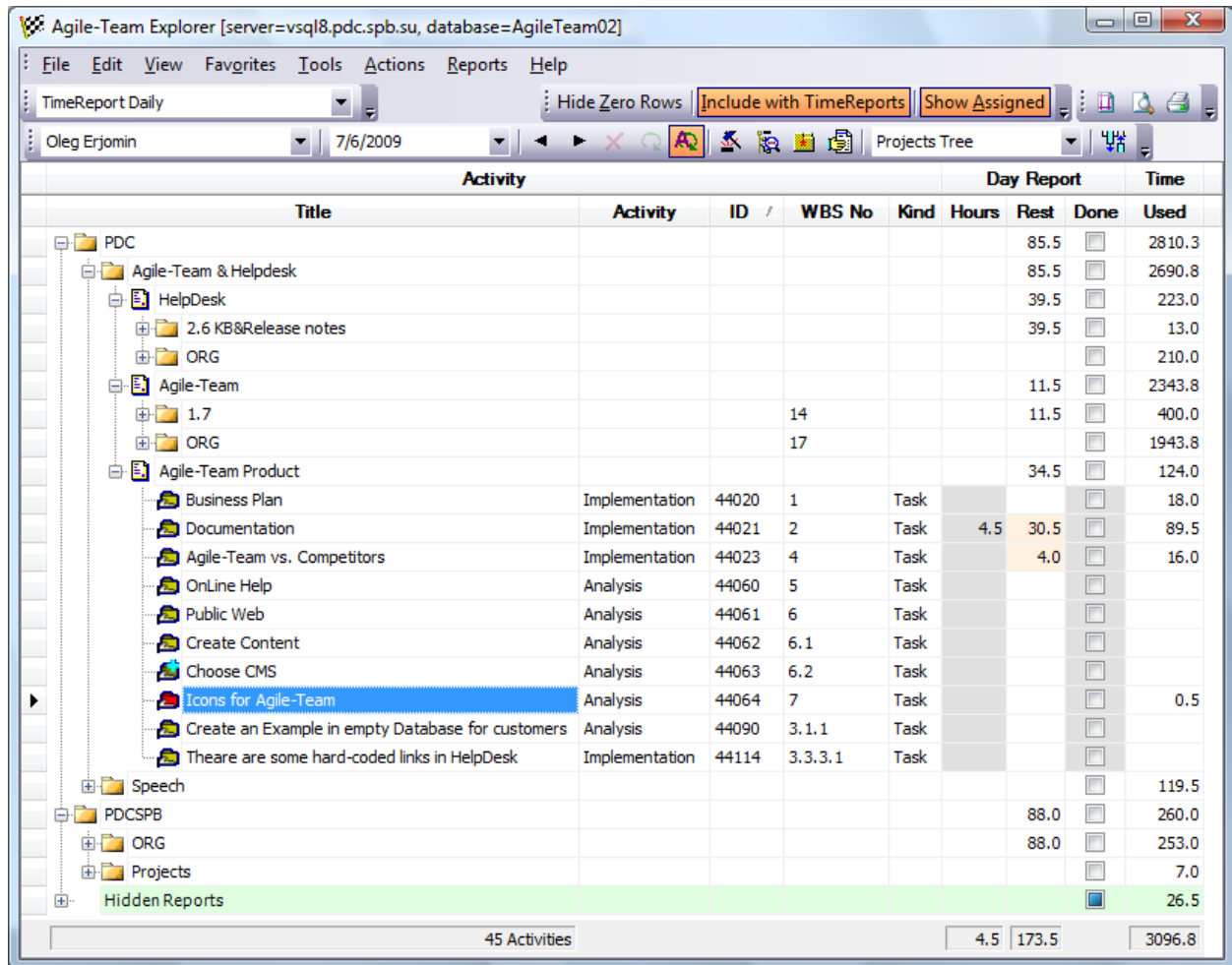
It is possible to sort Activities shown in TimeReport views by any column. Just click at the column header to switch between ascending and descending sort order. Sort order is shown as a small arrow icon in the column header.

Miscellaneous Operations

Operation	Menu Command	Shortcut Key	Toolbar button
Create New WorkItem	File/New/WorkItem	F7	
Locate the selected WorkItem in Explorer View			
Add TimeReport Daily View to Favorites	Favorites/Add to Favorites/TimeReport Daily View		
Resource Period Report	Reports/Resource Period Report		

TimeReport Daily View

The **TimeReport Daily** view is the most convenient tool to do Time Reporting for the current day.



Activity		Day Report			Time			
Title	Activity	ID	WBS No	Kind	Hours	Rest	Done	Used
PDC						85.5		2810.3
Agile-Team & Helpdesk						85.5		2690.8
HelpDesk						39.5		223.0
2.6 KB&Release notes						39.5		13.0
ORG								210.0
Agile-Team						11.5		2343.8
1.7		14				11.5		400.0
ORG			17					1943.8
Agile-Team Product						34.5		124.0
Business Plan	Implementation	44020	1	Task				18.0
Documentation	Implementation	44021	2	Task	4.5	30.5		89.5
Agile-Team vs. Competitors	Implementation	44023	4	Task		4.0		16.0
OnLine Help	Analysis	44060	5	Task				
Public Web	Analysis	44061	6	Task				
Create Content	Analysis	44062	6.1	Task				
Choose CMS	Analysis	44063	6.2	Task				
Icons for Agile-Team	Analysis	44064	7	Task				0.5
Create an Example in empty Database for customers	Analysis	44090	3.1.1	Task				
Theare are some hard-coded links in HelpDesk	Implementation	44114	3.3.3.1	Task				
Speech								119.5
PDCSPB						88.0		260.0
ORG						88.0		253.0
Projects								7.0
Hidden Reports								26.5
45 Activities					4.5	173.5		3096.8

The **TimeReport Daily** shows the activities that are [available for Time Reporting](#) for a selected Resource and at a selected date.

Activities are displayed in a grid which is able to group, sort, and filter them. Reported time, comments and the **Done** state can be edited using in-place editors.

How to Select a Resource and a Day in TimeReport Daily View

The **TimeReport Daily** view allows inspecting and editing reports for every Resource and entered at any day not only for the currently logged user, and not only for present day. This is controlled by the following section of the **Daily** toolbar:

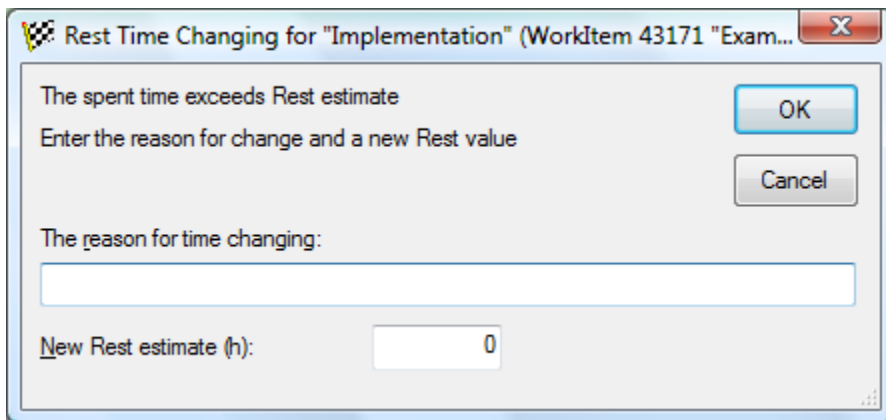


The leftmost dropdown tree at this toolbar is used to select the Resource which Time report you want to show. Date picker and arrow buttons next to the Resource chooser allow selecting the date of the Time Report that you wish to see or edit.

How to Enter a New Time Report or Edit an Existing One

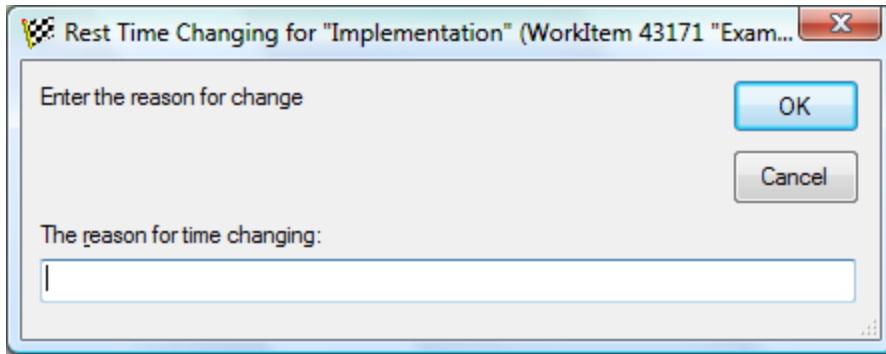
In order to enter a new Time Report, just select the proper Activity and enter the amount of hours, spent on this activity in the **Hours** column.

If the time, you have entered, exceeds the **Rest** time for a selected Activity, and the field **Explanation for Time Changing** is set to **Required** for the Project which WorkItem belongs to, then you will be asked to enter the explanations in the dialog shown below.



You can add a short comment to the Time Report. Simply type the comment text in the **Comment** column for the selected Activity. Press **Enter**

You can easily change the rest time for the selected Activity using TimeReport **Daily** view. Enter a new Rest value in appropriate column for the selected Activity. If the field **Explanation for Time Changing** is set to **Required** for the Project which WorkItem it belongs to, then you will be asked to enter explanations in the dialog shown below.

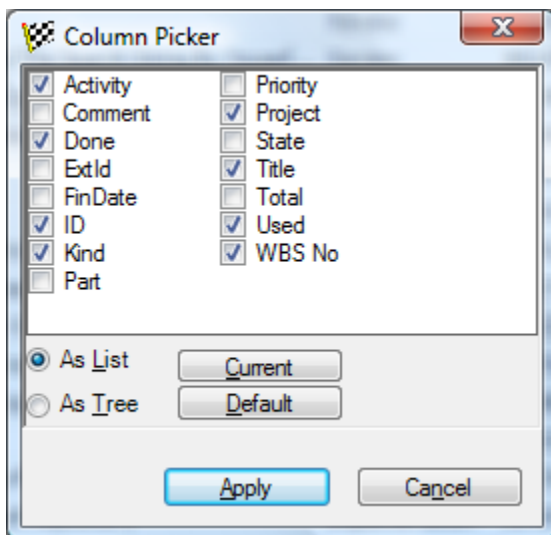


And finally, you can set the selected Activity **Done**. Just check the box in the column **Done** for this activity.

If you want to change other properties of an Activity or a WorkItem, just double click on the **Daily** View row, and Agile-Team will show the [WorkItem dialog](#) for the selected WorkItem.

TimeReport Daily View Columns

Like all other Agile-Team views, the **TimeReport Daily** view contains the **Column Picker**. It can be invoked by the **View/Column Picker** menu command (**Ctrl+K**) or by pressing the  toolbar button.



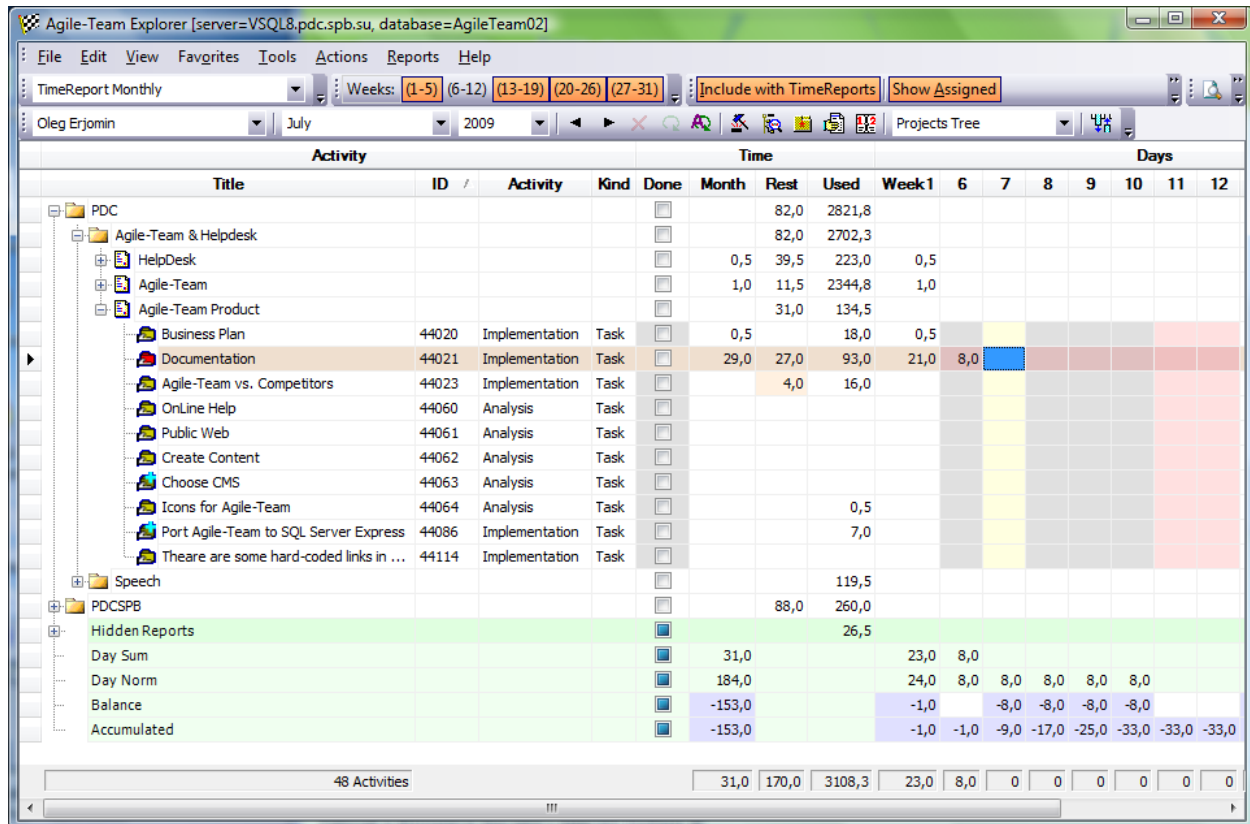
Activity	Activity Kind. Can be one of the following: Analysis, Implementation, Testing, Documentation, Knowledge Base, and Review.
Comment	A short comment for a Time Report. You can use the In-place editor in order to modify this field.
Done	This column contains a checkbox that can be used to set the Done state of an Activity.
ExtID	An optional string value that can be used for interfacing with other systems.

FinDate	The latest finish date.
ID	WorkItem ID, to which the selected Activity belongs.
Kind	WorkItem Kind. The Kinds of WorkItem are: Bug, Task, Issue, Question, and Note .
Part	Displays the Part assigned to the WorkItem.
Priority	This column displays WorkItem Priority level form 1 to 9.
Project	Displays the Project, which contains a WorkItem, this Activity belongs to.
Rest	Estimated remaining time for a selected Activity. You can use the in-place editor in order to enter a new value or modify an existing one.
State	Status of the WorkItem. It can be one of the following: Entered, InAnalysis, Analyzed, InProgress, InReview, Pending, Obsolete, Closed, Done, or Inactive .
Title	This column displays the Title of the WorkItem, to which a selected Activity belongs. WorkItems can be grouped in a Project Tree or Project List according to chosen grouping mode .
Total	Total time for an Activity.
Used	Time spent on an Activity.
WBS No	Shows the WBS number of the WorkItem, to which the selected Activity belongs.

TimeReport Monthly View

The **TimeReport Monthly** view is the most convenient tool to do Time Reporting for the whole month.

The **TimeReport Monthly** view is a table showing the Activities that are [available for time reporting](#) for a specific Resource during the whole month. The person can simply activate the in-place editor in some cell of this table to enter or modify a TimeReport.



The **TimeReport Monthly** view consists of columns for Activity properties and the **Daily** sheet. The **Daily** sheet corresponds to a selected [Resource calendar](#) for a specific month. Holidays are highlighted by slate red color. The current date is highlighted yellow.

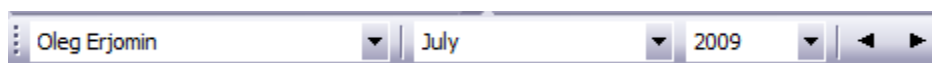
The **TimeReport Monthly** view allows summing of reported time by Activities and by Days and Weeks. It contains the **Month** column and four summary rows at the bottom.

Summing of reported times by Activities (horizontally), gives the possibility to see how many hours have been used on a given item during the month. Summing by days or weeks (vertically), gives a possibility to see how many hours have been used each Day, each Week and during the whole month.

How to Select a Resource and Month in the TimeReport Monthly View

By default, the **TimeReport Monthly** view allows inspecting and editing reports for the currently logged user and for the current month. However, you can do it for any other Resource and for any month in the past also.

A Resource, month and year can be chosen in the following toolbar.

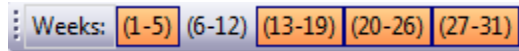


The leftmost dropdown tree at this toolbar is used to select the Resource whose Time Report you want to show. Month and year pickers next to the Resource chooser allow selecting a month and a year of the

Time Report that you wish to see or edit. Arrow buttons are used to navigate to previous and next months.

How to Collapse/Expand the TimeReport Monthly View by Weeks

In order to get a more convenient view, you can expand or collapse the **Daily** sheet of the **TimeReport Monthly** view using the **Weeks** toolbar.

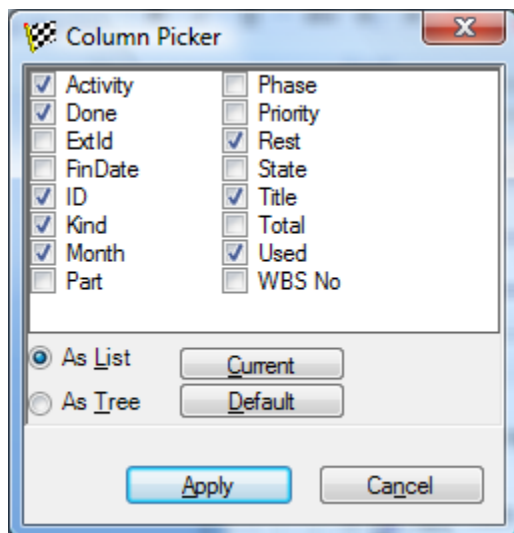


This toolbar contains buttons for each week in a month. The buttons display dates of each week. The highlighted buttons correspond to collapsed weeks.

The collapsed weeks have column headings like “Week1”, “Week2”, etc.

TimeReport Monthly View Columns

Like all other Agile-Team views, the **TimeReport Monthly** view contains the **Column Picker**. It can be invoked by the **View/Column Picker** menu command (**Ctrl+K**) or by pressing the  toolbar button.



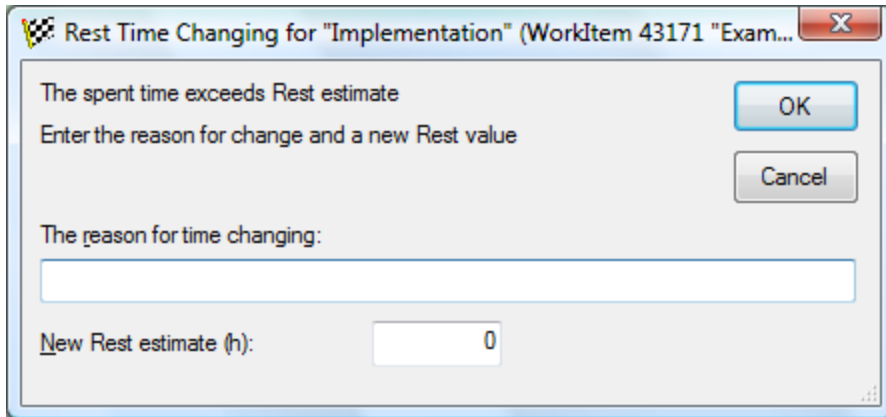
Activity	Activity Kind. Can be one of the following: Analysis, Implementation, Testing, Documentation, Knowledge Base, or Review.
Done	This column contains a checkbox that can be used to set the Done state of the Activity.
ExtID	An optional string value that can be used for interfacing with other systems.
FinDate	The latest finish date.

ID	WorkItem ID, to which the selected Activity belongs.
Kind	WorkItem Kind. Kinds of WorkItem are: Bug, Task, Issue, Question, and Note.
Month	Summary column that shows the sum of time reported on a selected item, i.e., Activity or Project node for the whole month.
Part	Displays the Part assigned to the WorkItem.
Phase	Displays the Phase, which the WorkItem belongs to.
Priority	This column displays a WorkItem Priority level from 1 to 9.
Rest	Estimated remaining time for a selected Activity. You can use the in-place editor in order to enter a new value or modify an existing one.
State	Status of a WorkItem. It can be one of the follow: Entered, InAnalysis, Analyzed, InProgress, InReview, Pending, Obsolete, Closed, Done, or Inactive.
Title	This column displays the Title of the WorkItem, to which a selected Activity belongs. WorkItems can be grouped into a Project Tree or a Project list according to a chosen grouping mode .
Total	Total time for an Activity.
Used	Time spent on an Activity.
WBS No	Shows the WBS number of the WorkItem, to which a selected Activity belongs.

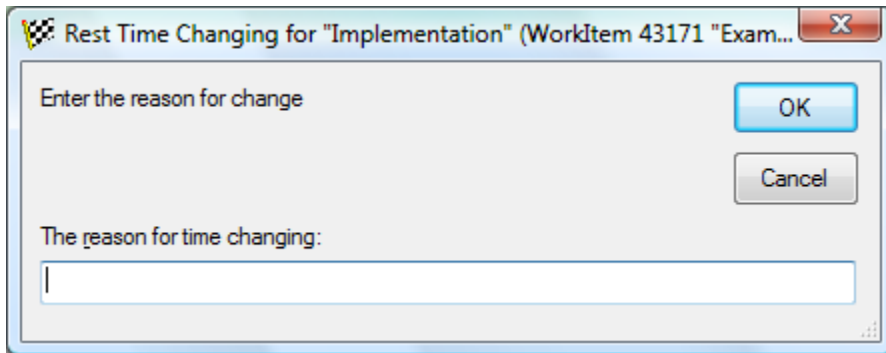
How to Enter a New Time Report or Edit an Existing One

To enter a new Time Report, just select a proper Activity and enter the amount of hours, spent on this activity in a proper cell of the Daily sheet.

If the time, you have entered, exceeds the **Rest** time for selected Activity, and the field **Explanation for Time Changing** is set to **Required** for the Project, to which a WorkItem belongs, you will be asked to enter explanations in the dialog shown below.



You can easily change the Rest time for a selected Activity using the **TimeReport Daily** view. Enter a new Rest value in an appropriate column for a selected Activity. If the field **Explanation for Time Changing** is set to **Required** for the Project, to which a WorkItem belongs, you will be asked to enter explanations in the dialog shown below.



You can add a short comment to the Time Report. This can be done using the cell in-place editor. Type a time value of the report, then type space", then type a comment. For example, "2,0 Simple Comment". If a Time Report contains a comment, its cell will be marked with a small red square in the upper right corner. A comment will be shown at the tooltip while the mouse hovers this cell.

And finally, you can set the selected Activity **Done**. Just check the box in the column **Done** for this activity.

If you want to change other properties of an Activity or a WorkItem, just double click on the **Daily** view row, and Agile-Team will show the [WorkItem dialog](#) for the selected WorkItem.

Summary Rows

A big advantage of the **TimeReport Monthly** view is for employees with Flexible working hours, because Agile-Team supports individual Calendar assignment for each Resource. Agile-Team can then calculate if there is registered more or less hours than the monthly norm.

Four bottom rows of the TimeReport Monthly view contain summary information by Days, Weeks and for whole month at the **Month** column.

Activity		Time	Days								
Title		Mo... /	1	2	3	4	5	Week2	Week3	Week4	Week5
▶	 Business Plan	0,5			0,5						
	 Documentation	29,0	8,0	8,0	5,0			8,0			
	 HelpDesk	0,5			0,5						
	 Agile-Team	1,0			1,0						
	Hidden Reports										
	Day Sum	31,0	8,0	8,0	7,0			8,0			
	Day Norm	184,0	8,0	8,0	8,0			40,0	40,0	40,0	40,0
+	Balance	-153,0			-1,0			-32,0	-40,0	-40,0	-40,0
	Accumulated	-153,0			-1,0	-1,0	-1,0	-33,0	-73,0	-113,0	-153,0
48 Activities		7	8,0	8,0	7,0	0	0	8,0	0	0	0

Day Sum

Sum of hours reported for the given day or week for the Resource. Notice that these values are repeated in the bottom Agile-Team status line. See the picture above. So you always see the **Day Sum** information independent of the view scrolling.

Day Norm

The expected number of hours to work at the given day for the selected Resource, who is working under the selected Calendar.

Balance

This row contains the *zero* value if the number of hours registered for a day equals to the **Day Norm** for the Resource (determined by the assigned Calendar). This row contains a *positive* value if more hours are registered for the day than **Day Norm** and a *negative* value if less.

Accumulated

Cells of this row display the difference between the number of hours, which should be worked out beginning from the start of the month according to the Calendar **Day Norm** and a number of hours that are really registered beginning from the start of the month according to the total sum of **Day Sum**.

Version Management

Software is developed in versions. New features and bug fixes appear in a given version – but a version might also introduce new bugs. When a software version is sent out to the customers, we speak about a *release* of the software.

Agile-Team has a separate **Version** dimension that represents version numbers of the software releases. WorkItems can be linked to the **Version** dimension.

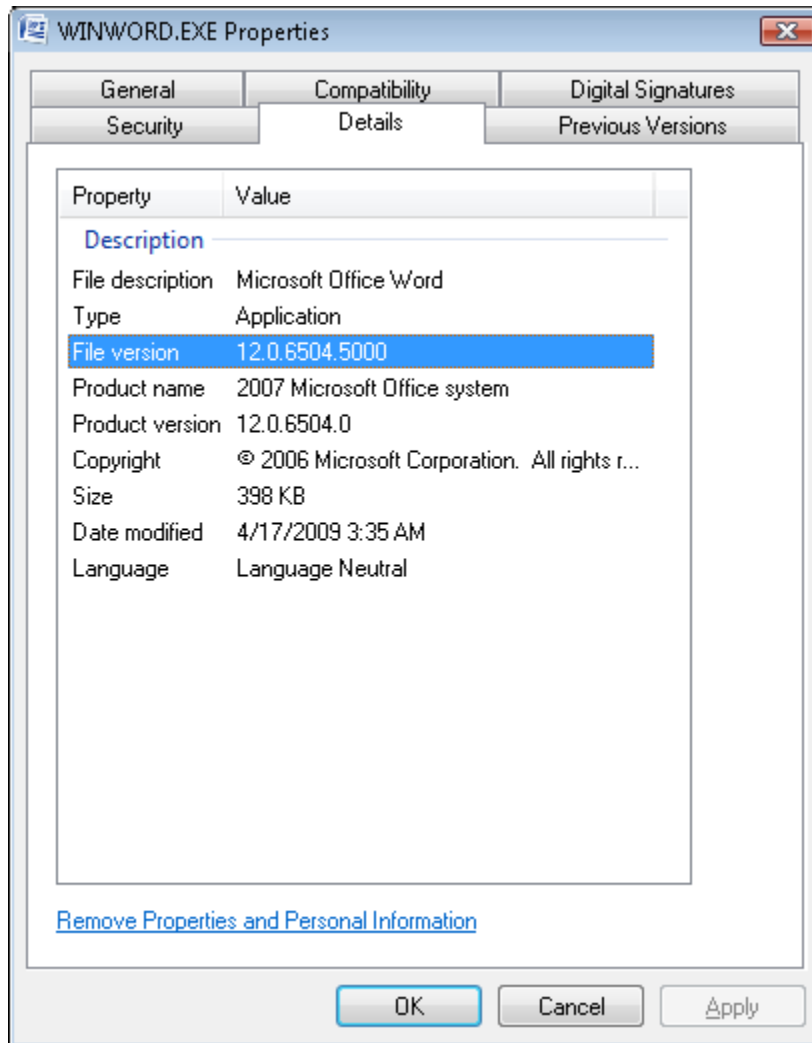
The version management in Agile-Team can assist the software developing process in the following areas:

- Maintaining a history of releases, -what did we release in the past.
- Planning of releases, -what will we solve in each release.

- Control over **Bugs**, -when did they appear, -when are they fixed.
- Generation of **Release Notes**, -what is done from one version to another.
- Generation of **Knowledge Base**, -what problems are known in a given version.

Software Version Numbering

Both Linux and Microsoft Windows have a standard of using four integers to identify a given version of the software (like **2.4.1.15**). The product version number can be stored in the Windows version resource:



The **four** integers are commonly referred to as: **<Major>.<Minor>.<Build>.<Revision>**.

Deciding on Version Numbers - Compatibility Levels

You are free to use whatever version numbering you'd like as you release new versions. However, it is useful for your product to establish standards for choosing new version numbers. Here is one standard that Microsoft suggests:

- A new major or minor part indicates that the new version is incompatible with the old one. For example, the version 2.0.0.0. should be incompatible with the version 1.1.2.5. You should change major version numbers whenever you introduce an incompatibility into your code.
- A new build part indicates probable compatibility. Typically you should change minor version numbers, when you introduce a service pack or a minor upgrade. For example, the version 1.8.0.0. is probably compatible with the version 1.7.0.0.
- A new revision part indicates a QFE (Quick Fix Engineering) release that is compatible with the previous version and that should be installed. For example, the version 1.6.5.13. might be a mandatory bug-fix upgrade to the version 1.6.5.12.

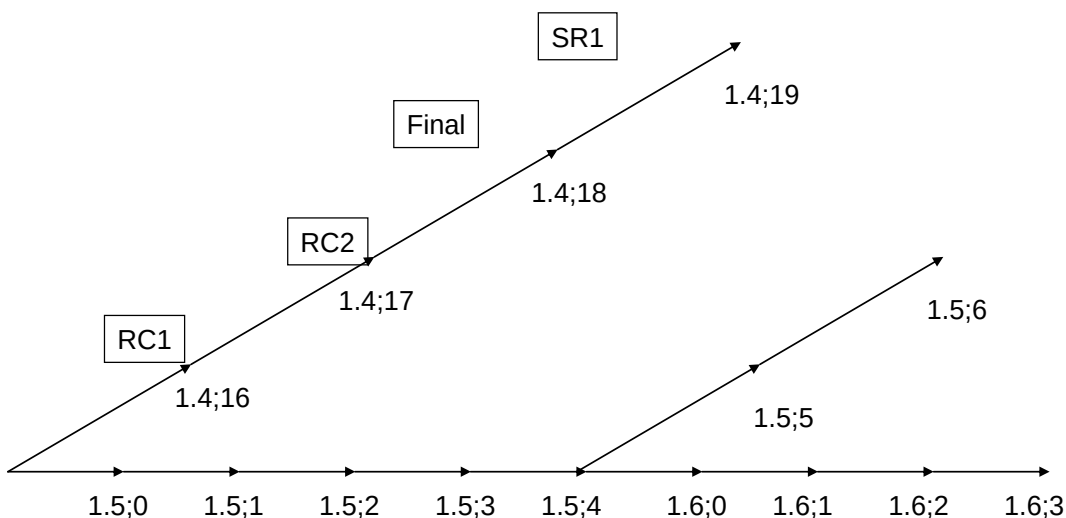
In addition to a version numbering strategy it is a good idea to develop a strategy to identify the stage of the software for any given version, examples are Pre-Release, Develop, Alpha, Beta, Final, Service-release.

Also, depending on your version numbering strategy product, you can identify a version by three numbers (like **HelpDesk 1.3.2**), by two numbers (like **VIP 6.0**, **VIP 6.1**), and even by one number (like **VIP 5**).

Agile-Team uses the special notation for the [Current Version](#) nodes that have not yet made a decision about their number. Use asterisk (*) as the latest part of a number for such versions.

Source Code Branching

Most software is created as a linear set of versions, where the next version of the software is based on top of the source for the previous version. But when software grows larger and more mission critical for the customers, it becomes important to support previous versions of the software while developing a new version of the software. In this case, most teams will use a source control system, and the source code will be branched, so the previous version of the software can be maintained without introducing bugs because of new development. Most often, this branching can be drawn like this:



In some cases, sub branches will further be branched.

Some companies will name each branch of the tree and a common name to the branch, where new development is done, something like “Source” or “Work”.

In Agile-Team, it is assumed that versions can be seen as an ordered tree, where versions with higher numbers are based on the source code of versions with lower numbers.

Version Constraints Enforced in Agile-Team

- It is not allowed to have the same version number twice for a product. This will be checked across all branches for the product. (A zero for a number is treated bigger than a blank.)
- The four integer version number for a version node must be bigger than the four integer version number for the previous version node in the tree within a branch. But, this rule is not applicable to the version nodes that belong to different product branches.
- A WorkItem cannot have the **Version** property set to two versions that are placed in the same path from the root to the leaf of the **Version** tree for a product.
- The Property **VersionAppeared** must come before and be placed in the same path as each of the versions specified in the **VersionDone** property.
- A Branch or a Version node cannot be deleted, if any Project nodes or WorkItems refer to it.

Version Dimension

The version support in Agile-Team is implemented around the **Version** dimension, which is a tree that “stores” the branches and versions for a product.

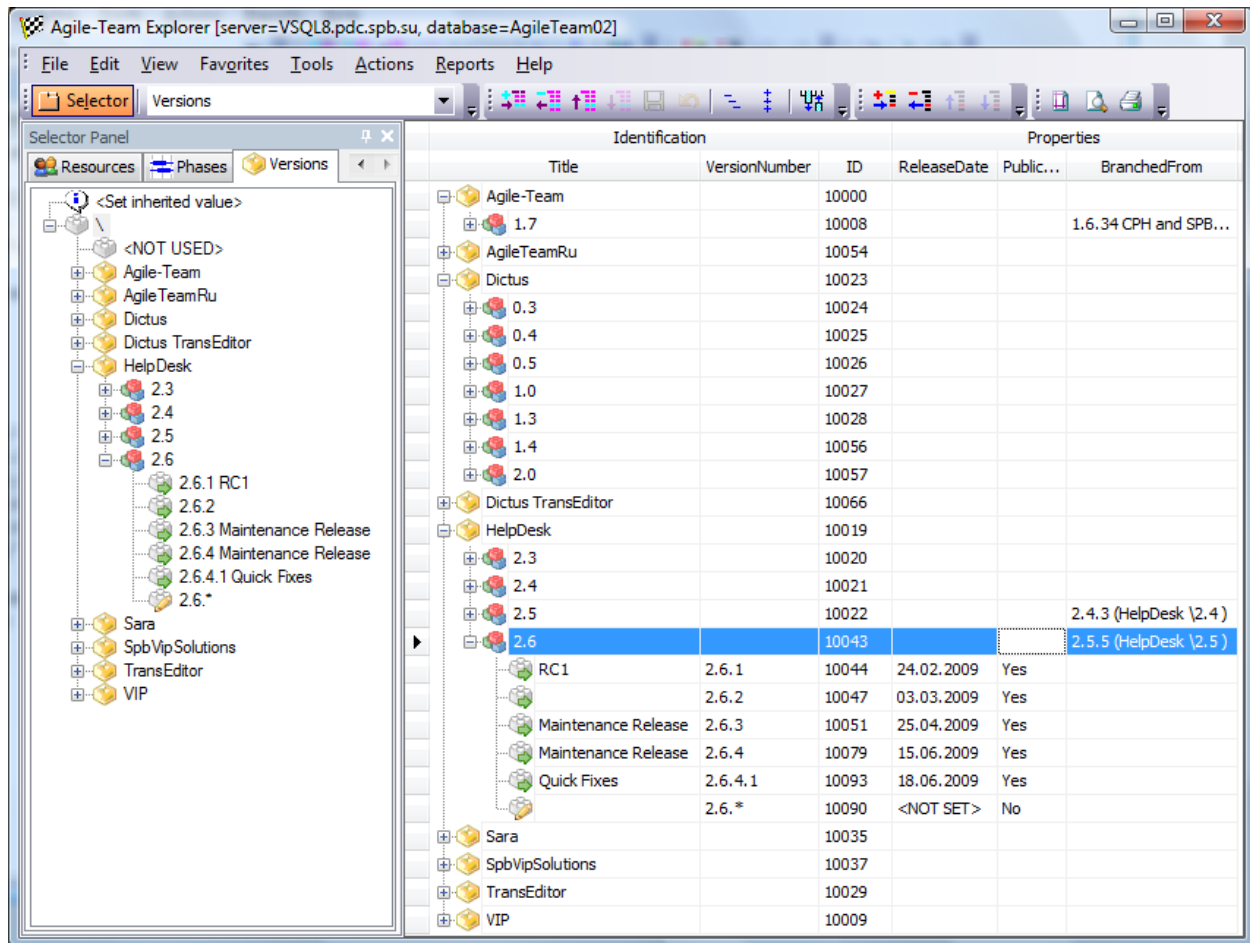
The first level in the **Version** tree corresponds to products. In the picture below they are **Agile-Team**, **HelpDesk**, **Sara**, **VIP**, etc.

The second level of the **Version** tree represents the **Branches**.

The third level in the tree represents the versions of a product.

Versions View

The list of versions can conveniently be viewed and managed in the **Version** dimension view.

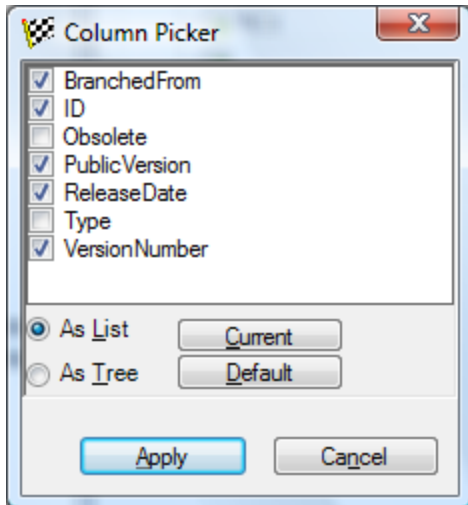


Agile-Team operates with **three** different kinds of version nodes, each having their own icon:

- Current Version**  This is the version currently under development. When a WorkItem is done for the software, this is the version number to assign to the WorkItem when it is marked done.
- Closed Versions**  These versions have been given out to someone, and the date set for the release. (Sometimes these are referred to as finished versions, or done versions.)
- Public Versions**  These versions have been released, and are in use by some users. The version might be active on the Helpdesk or Knowledgebase web.

Version View Columns

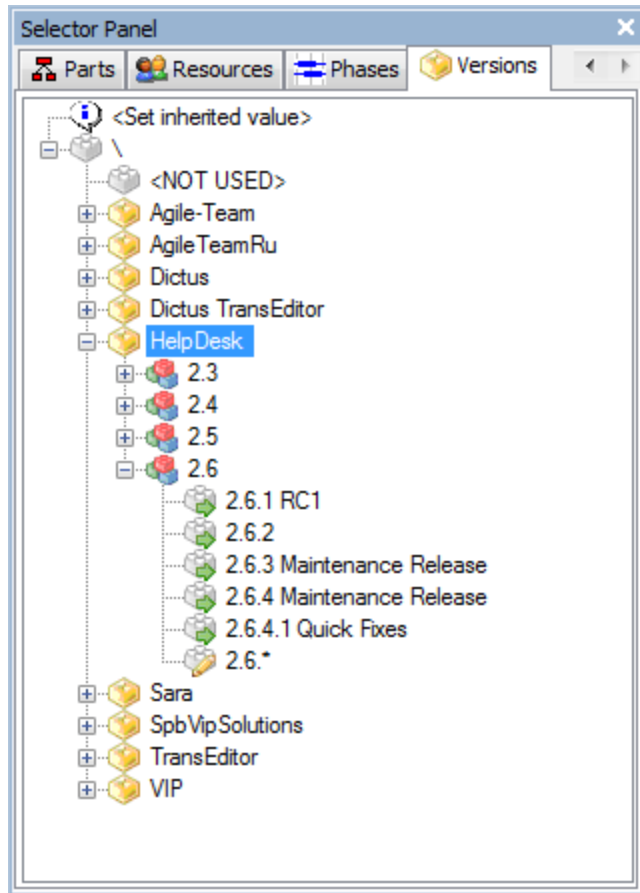
Like all other views of Agile-Team, the **Versions** view contains the **Column Picker**. It can be invoked by the **View/Column Picker** menu command (**Ctrl+K**) or with the toolbar button .



BranchedFrom	Shows the version node, the selected version is branched from.
ID	A unique version identifier. It is informational only for Agile-Team, but can be used for interfacing with other systems. For example, this ID is used by Helpdesk in URLs for Release Notes or Knowledgebase pages. <i>http://mysite.com/helpdesk.aspx#mnuProductRelNotes&FromID=10051&ToID=10093&Product=9</i>
Obsolete	Sets a product or a branch as obsolete. This flag is not applicable to versions.
PublicVersion	Sets a selected version as public version, i.e. sets that this version has been released. Public versions will appear at Helpdesk or Knowledgebase web.
ReleaseDate	This column allows inspecting or modifying the date when the version was finished. It is the Finish date for Closed Versions and Release date for Public Versions.
Title	Optional Title of a version, for example RC1, Alpha, Beta, etc.
Type	The type of selected item: Product , Branch or Version .
VersionNumber	Version Number. See Software Version Numbering .

Versions Tab in the Explorer

The Versions dimension is placed at a separate tab of the **Explorer Selector** panel, along with other dimensions such as **Parts**, **Phases**, **Resources**, and so on.



The following Version Tree operations are available:

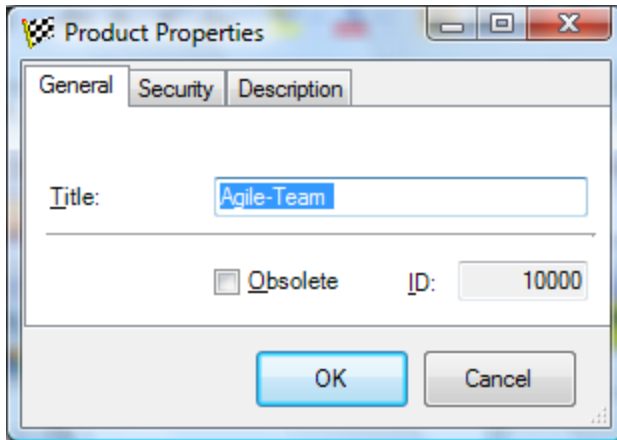
Operation	Menu Command	Shortcut Key	Context menu
Create New Product	File/New/Product	Ctrl+Shift+D	Add SubItem (Ctrl+N)
Create New Branch	File/New/Branch	Ctrl+Shift+B	Add SubItem (Ctrl+N)
Create New Version	File/New/Version	Ctrl+Shift+V	Add SubItem (Ctrl+N)
Delete Item	Edit/Delete	Del	Delete Item
Move Item Up	Edit/Move Item Up	Alt+Up	Move Item Up
Move Item Down	Edit/Move Item Down	Alt+Down	Move Item Down
Edit Properties	File/Properties	Enter	Properties

Working with Products

A new Product can be created either with the **File/New/Product** menu command (**Ctrl+D**) or with the **Add SubItem** context menu command (**Ctrl+N**), when the root node of Versions Tree is selected.

In order to modify the properties of an existing Product, just select it in a tree and press **Enter**, or double-click it.

To create a new Product or to modify properties of an existing one, use the **Product Properties** dialog.



For each Product the following properties can be specified.

Title A unique product name

Obsolete A flag that marks a selected Product as not relevant any more.

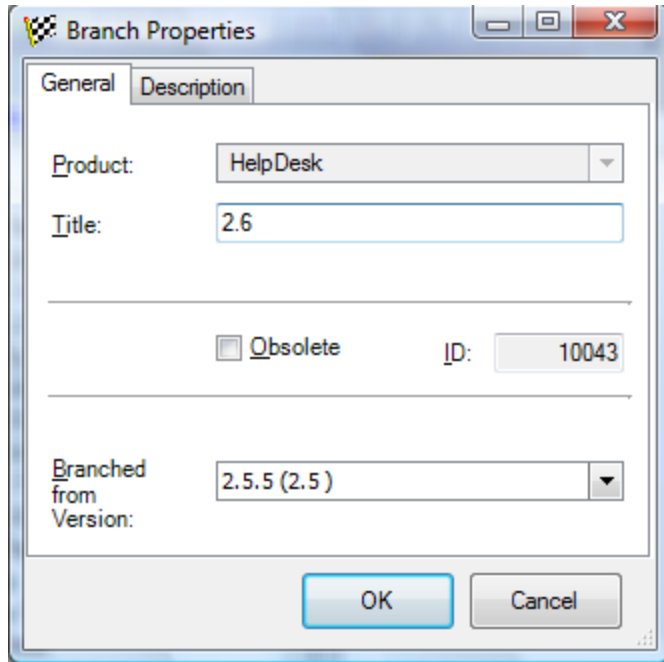
ID An informational field that shows a unique identifier of the Product. Can be used for interfacing with other systems.

Working with Branches

A new Branch can be created either with the menu command **File/New/Branch** (Ctrl+B) or with the context menu command **Add SubItem** (Ctrl+N) available, when the Product node is selected in the **Version Tree**.

To modify the properties of an existing Branch, just select it in the tree and press **Enter**, or double-click it.

Both, when you are creating new Branch and edit the existing one, the Branch Properties dialog is used.



For each Branch the following properties can be specified.

Product	The Product, which a Branch belongs to, is shown in this read-only field.
Title	Name of a Branch. It must be unique within a Product.
Obsolete	This flag is used to mark that the complete branch is not relevant any more.
ID	Informational field that shows a unique identifier of the Branch. Can be used for interfacing with other systems.
Branched from Version	A version node, from which the Source code for a new Branch is based on.

Working with Versions

A new Version can be created either with the **File/New/Version (Ctrl+N)** menu command or with the **Add SubItem** context menu command (**Ctrl+N**), when the Branch node is selected in the Version Tree.

In order to modify the properties of an existing Version, just select it in the tree and press **Enter**, or double-click it.

Both when you are creating a new Version and editing an existing one, the **Version Properties** dialog is used.

The screenshot shows a 'Version Properties' dialog box with the following fields and values:

- Product:** HelpDesk
- Branch:** 2.6 (HelpDesk)
- Title:** RC1
- Number:** 2.6.1 (with an 'Edit Number' button)
- ID:** 10044
- Date:** 2/24/2009
- Public:** ☒

The following properties can be specified for each Version.

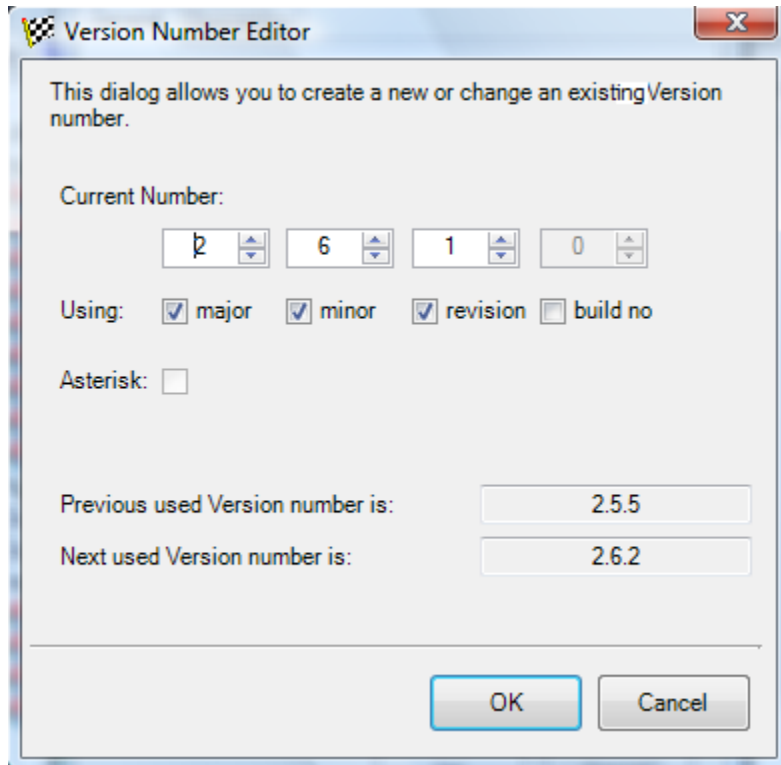
- | | |
|----------------|---|
| Product | A read-only field that displays the Product of the selected Version. |
| Branch | A read-only field that shows the Branch, in which the Version node is placed. |
| Title | An optional title for the Version. Examples: RC1, Public-beta, etc. |
| Number | <p>Here you specify four integer version number. See Software version numbering, and Version constraints enforced in Agile-Team for more information about numbering rules.</p> <p>Press the Edit Number button below this field to invoke a special editor that will help you to fulfill those rules.</p> |
| ID | <p>A unique version identifier. It is informational only for Agile-Team, but can be used for interfacing with other systems. For example, this ID is used by Helpdesk in URLs for Release Notes or Knowledgebase pages.</p> <p><i>http://mysite.com/helpdesk.aspx#mnuProductRelNotes&FromID=10051&ToID=10093&Product=9</i></p> |

Date	The Date when the version was given out. It is a finish date for closed versions and a release date for public versions.
Public	Sets a selected version as Public Version, i.e. sets that this version has been released. Public Versions will appear at Helpdesk or Knowledgebase web.

When a new version node is created, the previous current node for the Branch will be closed, and the new node will become the current development node for the Branch. If a date was not specified by a user, the date will be set automatically in the previous current version node.

Version Number Editor

In order to help meet Version numbering rules, enforced in Agile-Team, you can use a special Version Number Editor.



By default the last used number element will be increased by 1 for new versions, but you can override it, if the [constraints](#) are met.

Connecting WorkItems to Versions

There are two properties that link the WorkItems to the Version dimension.

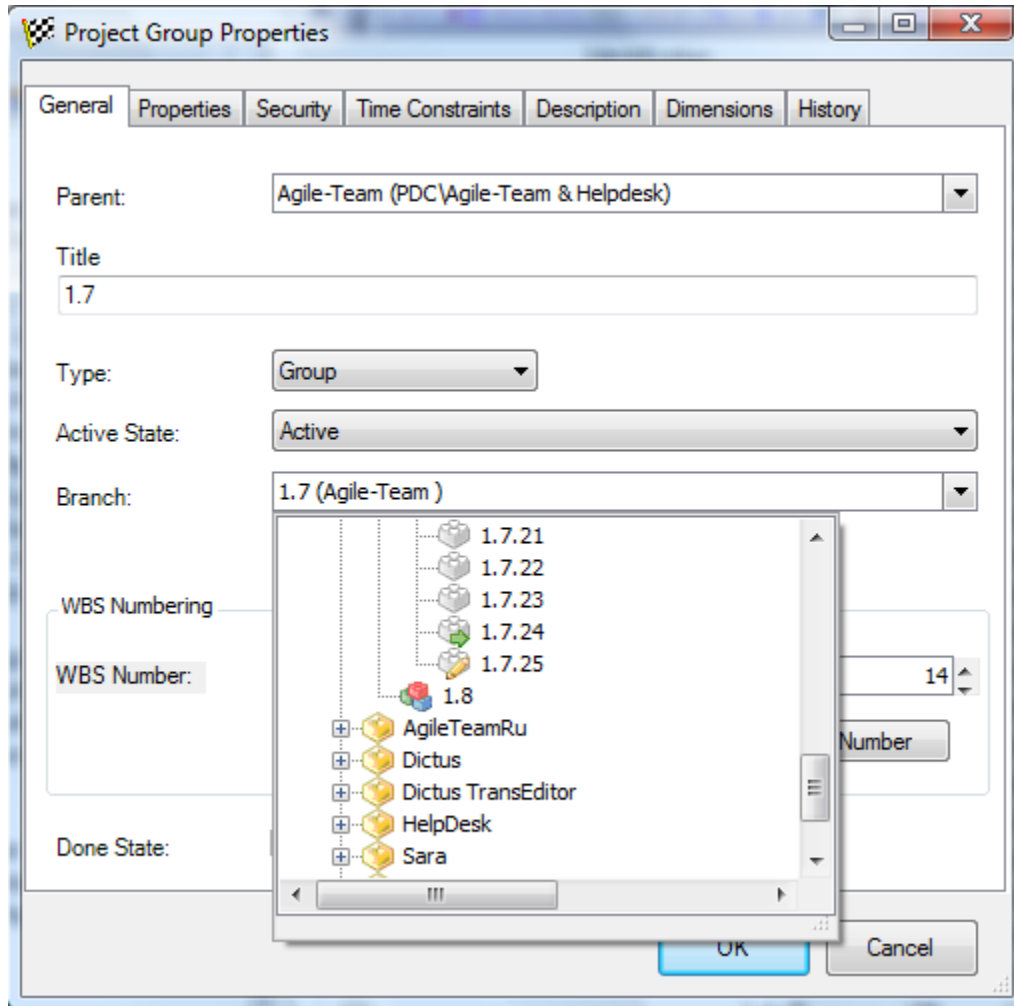
VersionDone	For done WorkItems, in it can be specified, the versions in which they were implemented.
--------------------	--

VersionAppear

For Bugs, in it can be specified, in what version they appear.

Default Version Number Assignment to WorkItems.

A Project node has the **Branch** property. By setting this property, the Current Version for the branch will be assigned automatically to the **VersionDone** property for the WorkItem, when the implementation for the WorkItem is marked done.



Specifying the Version in which a WorkItem Is Implemented

The **VersionDone** is set automatically for a WorkItem, when the implementation activity is marked done, but it is possible to change the settings.

When fixing bugs, in more than one Branch of the source code, it is necessary to register multiple versions, where a bug fix was implemented.

WorkItem 43171 <Edit Mode>

ID: 43171 Kind: Bug Parent: Sample Project (OE) Priority: 4 Status: Done

Title: Example BUG

Descriptions Management Time Reports Time Constraints Dimensions Miscellaneous Predecessors Helpdesk History

First Time Report Date: 6/30/2009 Last Time Report Date: 6/30/2009

Phase: Phase I (Agile-Team)

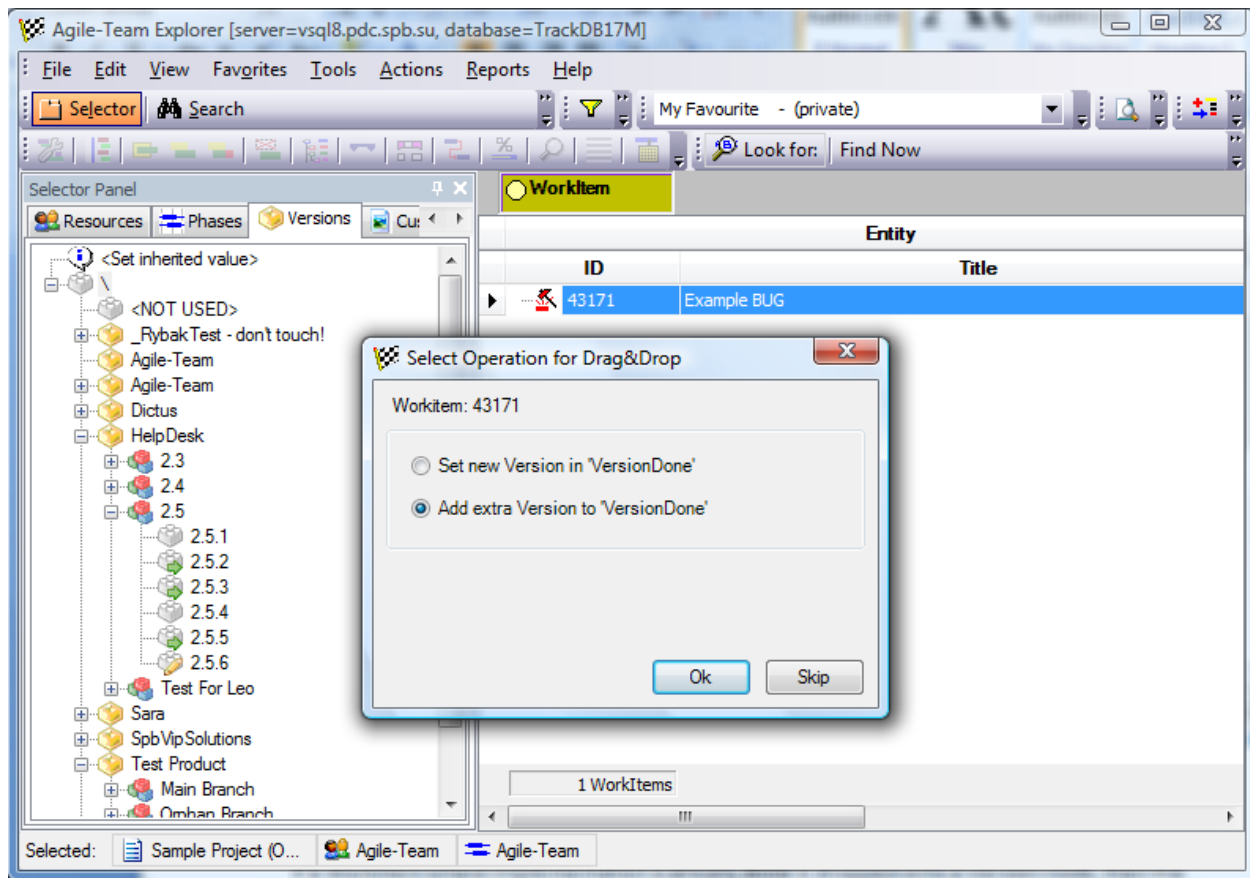
Version Done: 1.0.1010 (Dictus\1.0), 1.3.1

Earliest Start: Parent Earliest Start, Earliest Start: 6/1/2009

Buttons: Locate, Print..., Copy, Mail..., OK, Cancel, Apply

The **Version Done** property for a WorkItem can be set also by drag and drop of the WorkItem to the **Version** tree.

If a WorkItem, where Implementation was already **done**, is dropped onto a Version node, then the following dialog appears:

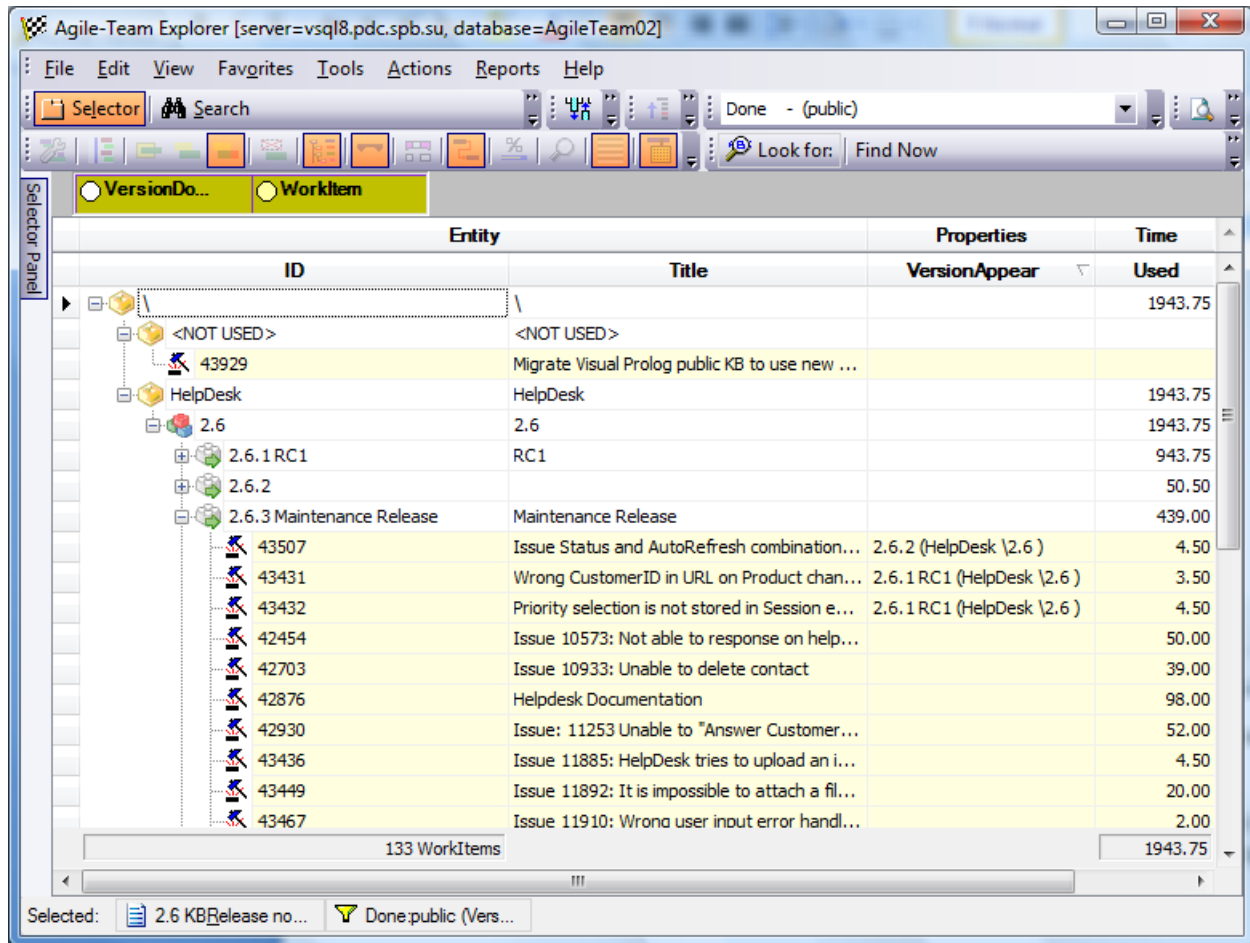


When you check the **Set new Version** radio button, the **Version Done** for the WorkItem will be changed to the new Version.

When you select **Add extra Version**, the new Version will be added to the WorkItem. However, remember that both specified Version numbers must be in separate Branches of the product, and not on the same path from root to the leaf.

Version Columns in the WorkItem Explorer

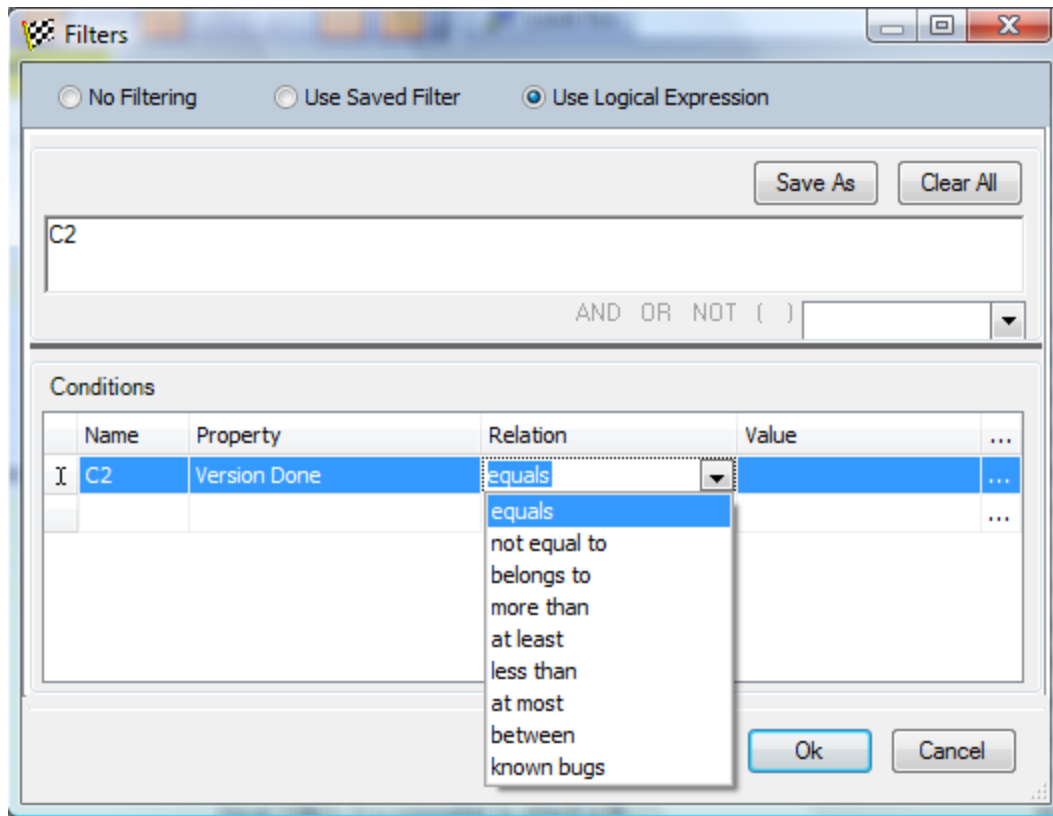
The **WorkItem Explorer** can show two version columns **VersionAppear** and **VersionDone**.



Version Filters

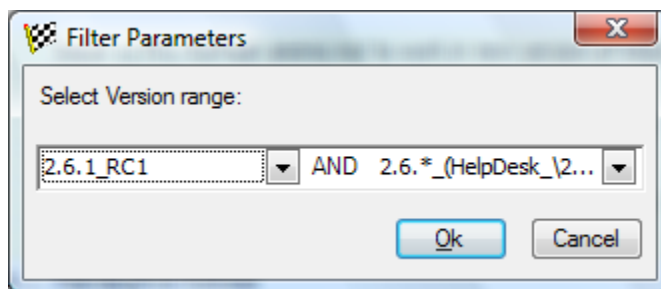
It is possible to filter on the two properties **VersionAppear** and **VersionDone**:

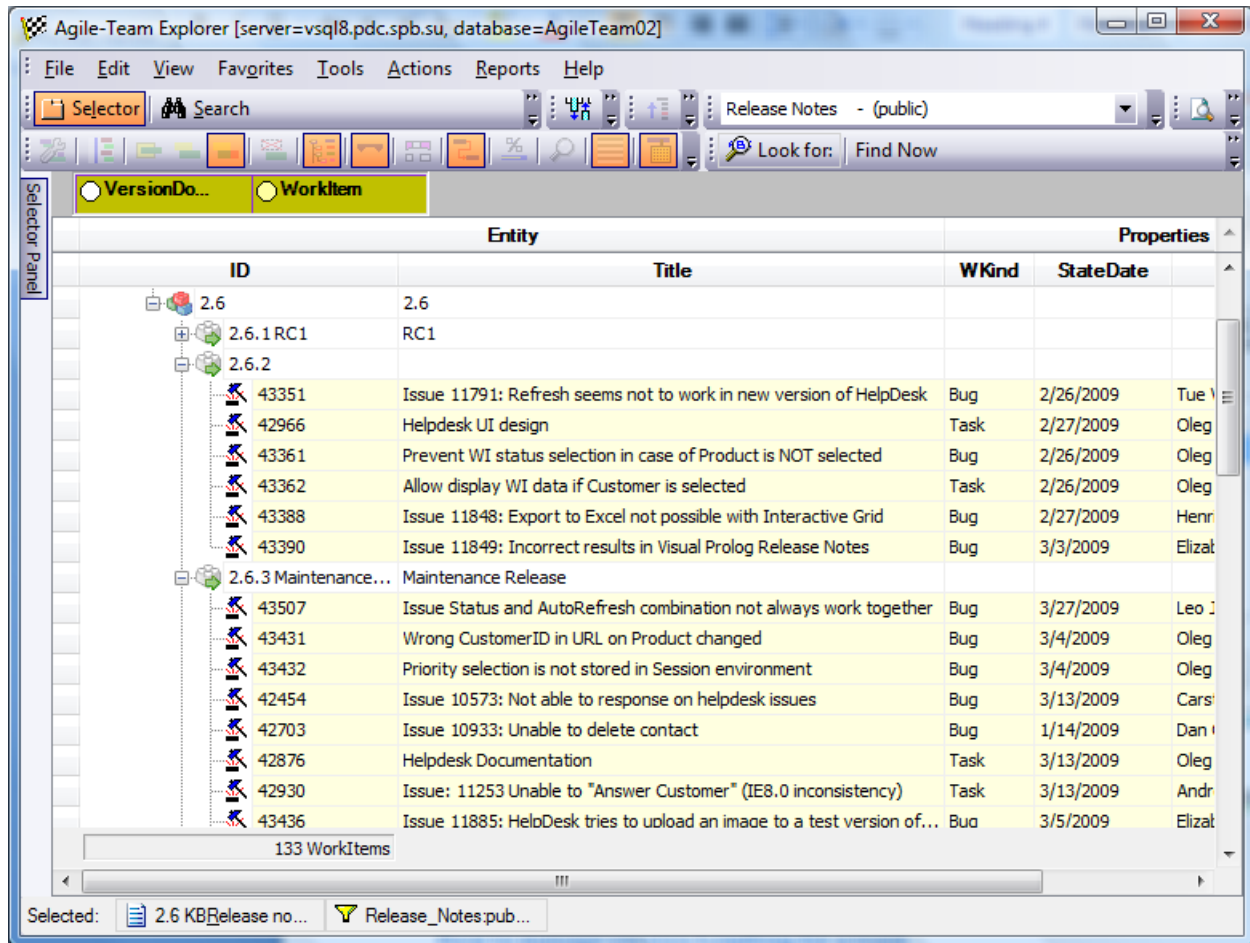
The properties have several relation possibilities:



Generation of Release Notes

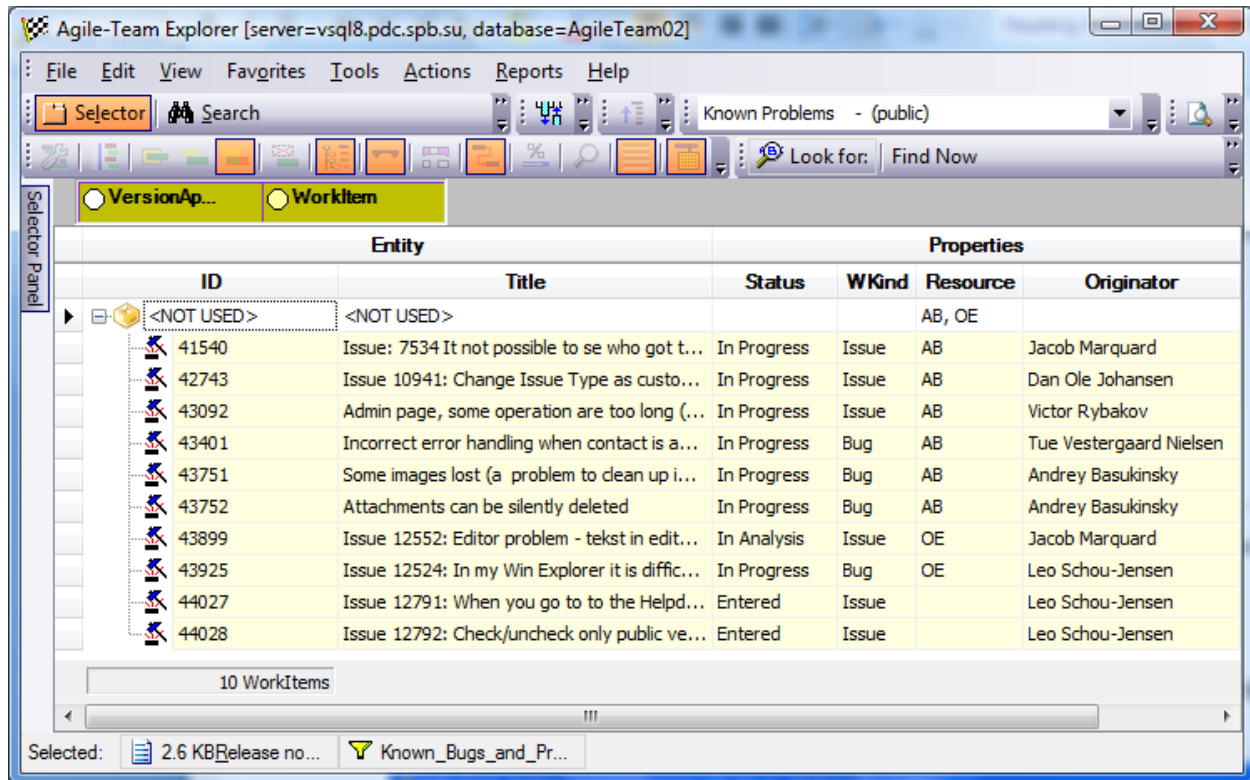
For the filter property **VersionDone**, the relation **between**, can be used to filter out the WorkItems marked done from one version to another. If the **Prompt** dialog is used as the way to obtain the value, a user will be asked about two version numbers.





Known Bugs and Issues for a Given Version

The Relation “**knownbugs**” for the **VersionDone** property, can be used to filter out the Bugs and Issues that are relevant for a given version.



For WorkItems to appear in this filter, they must:

1. not be marked done in a version before this version,
2. and they must not be marked to appear after this version.

How to Manage Version Handling for a Team

Appoint a Release & Branch Manager

Identify a person, to have responsibility for the release management for a product. This person must create a new version node each time a version of the software gets released, and create a new Branch node in Agile-Team, when a branch is created in the source control system.

Set Appeared Property in for BUGS

When supporters analyze a new bug report from users, they should also consider in which version of the product the bug first appeared. When developers fix the bug, they should investigate whether the **Appeared in** information is correctly set.

Register Extra Versions for a WorkItem, when Code Is Merged into Another Branch

Normally the version information is set automatically for a WorkItem by looking up the **Current Version Number** for the branch specified in the WorkItems parent project node.

But, when fixing bugs, for a branched version, it is usually necessary to register multiple versions, where a bug fix is implemented.

Working with Dimensions

Dimensions are one of the core concepts of Agile-Team. They provide a unique possibility to have unlimited number of flexible multi-aspect representations of working process.

There are **five** predefined Dimensions in Agile-Team: **WBS**, **Resources**, **Parts**, **Phases**, and **Versions**. You can define as many additional Dimensions as you need. The most obvious examples of such user-defined Dimensions are **Countries**, **Customers**, and **Company Departments**.

Predefined Dimensions have a fixed set of properties. These properties are described in corresponding chapters of this document.

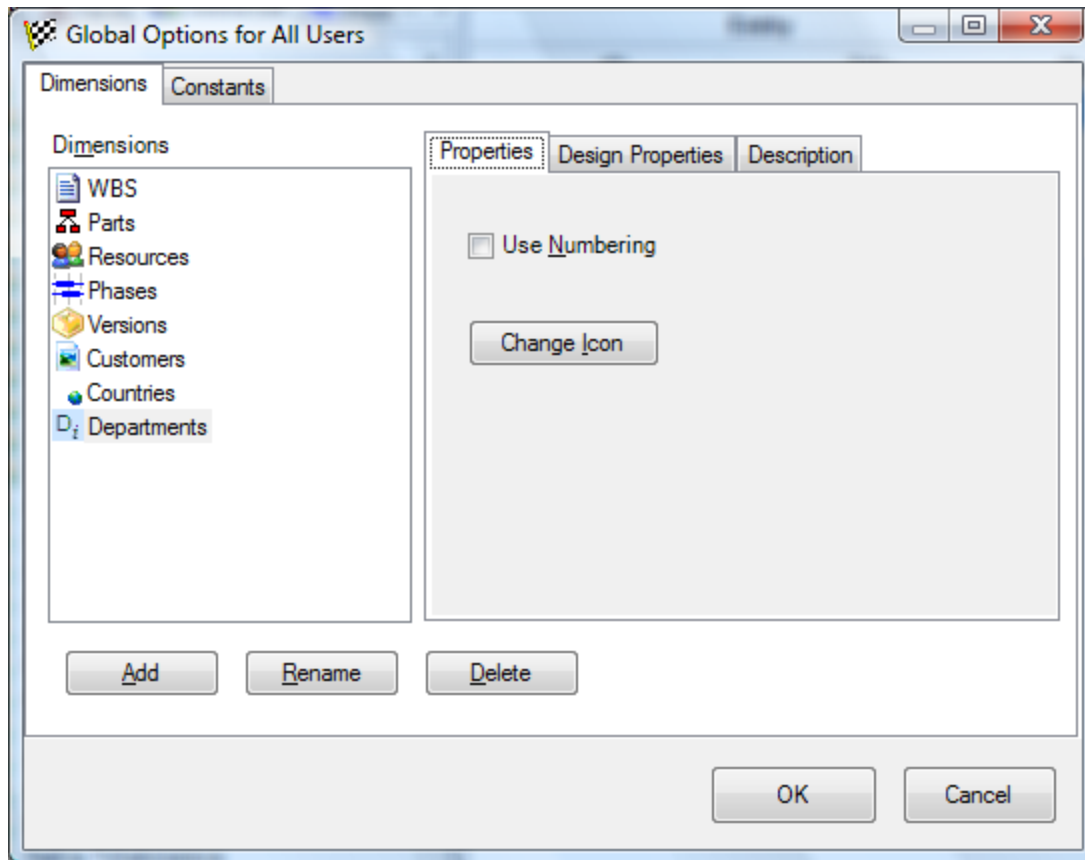
User defined Dimensions are fully customizable. They have only **two** predefined properties: **Title** and **ID**. You can define as many custom properties as you need.

WBS items of any level, i.e. **Project**, **WorkItems** can refer to any user-defined Dimensions. Also Dimension items itself can refer to other Dimensions also.

Dimension Management

In order to be able to manage Dimension, a user must have proper rights assigned. See [Permissions for Global Operations](#).

Dimension management is performed using the **Global Options for All Users** dialog. This dialog can be invoked using the **Tools** menu.



If you choose the **Dimension** tab of this dialog, you will see the list of all Dimensions registered in Agile-Team database. Selecting from this list you can inspect or edit Dimension properties.

Both predefined and custom Dimensions have **two** general properties:

Use Numbering – this option defines whether the Dimension uses hierarchical multilevel numbering. Typical Dimension with Numbering is WBS Dimension. The example of numbering is shown below:

Air Alsie	807
Implementation	807.2
Administration	807.2.2
Development	807.2.1
Crew	807.2.1.3
CrewConnex	807.2.1.4
CRM	807.2.1.1
Electronic Flight Bag	807.2.1.5
FlightOps	807.2.1.2

Icon – By default, newly created Dimensions will have the  icon . You can change it at any time by pressing the **Change Icon** button.

How to Create a New Custom Dimension

To create a new custom Dimension, press the **Add** button in this dialog. A new Dimension with the icon  and the **Dimension N** name will appear in the list. You can change its name, icon, and define Item properties further.

How to Rename a Custom Dimension

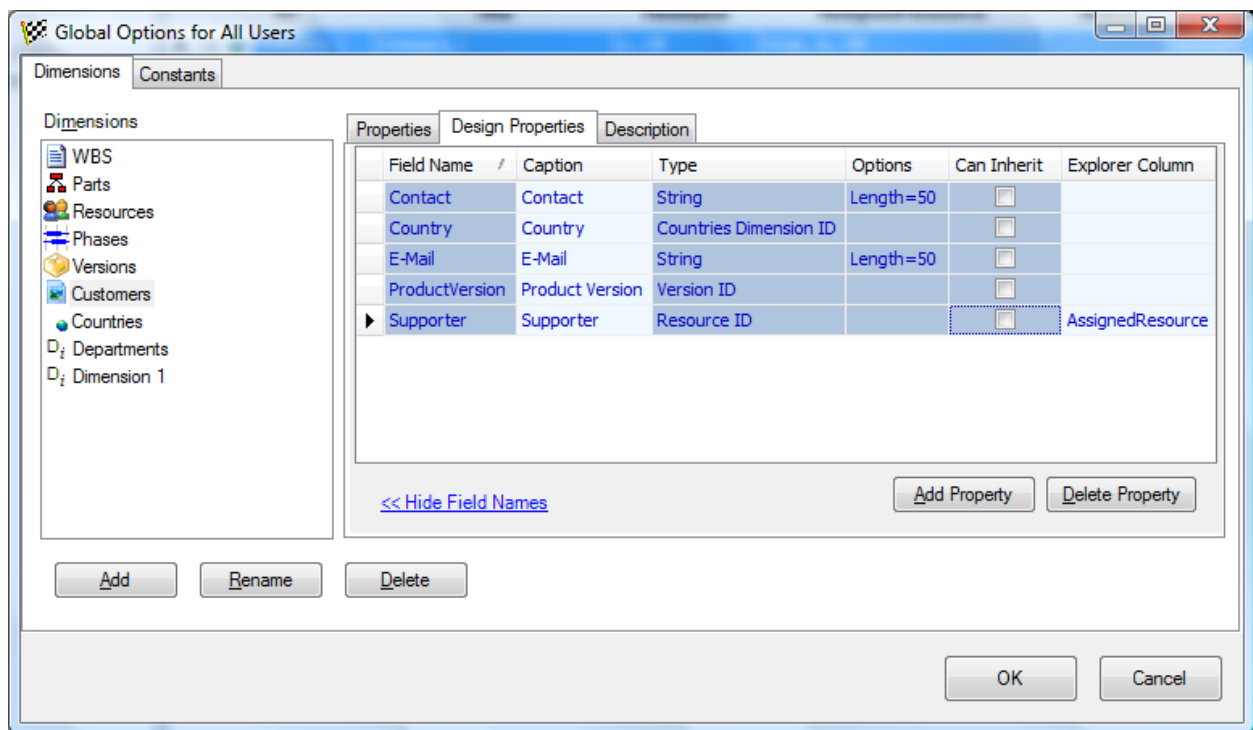
In order to rename a custom Dimension, just select it in the list and press the **Rename** button. Type a new name in the in-place editor. Submit renaming by pressing the **Enter** key.

How to Delete a Custom Dimension

If you want to delete a custom Dimension, select it in the list and press the **Delete** button. If there are any references to this Dimension items from a WBS, or another Dimension, you will be warned against it.

How to Define a Custom Dimension Item Properties

Any user-defined Dimension can have an arbitrary set of custom properties. The **Design Properties** tab page provides a tool for designing and maintaining of these set of properties.



This page contains a sheet, where you can inspect all existing properties and create new properties.

Each custom Dimension item property is defined with:

Field Name

A user-defined Dimension is mapped to real Data Table at SQL Server database. This column defines real field names of this data table. In most cases, the field name will exactly match the caption of the item property.

Link “Hide Field Names” allows hiding this column.

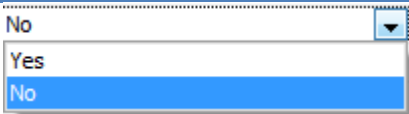
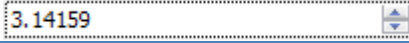
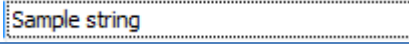
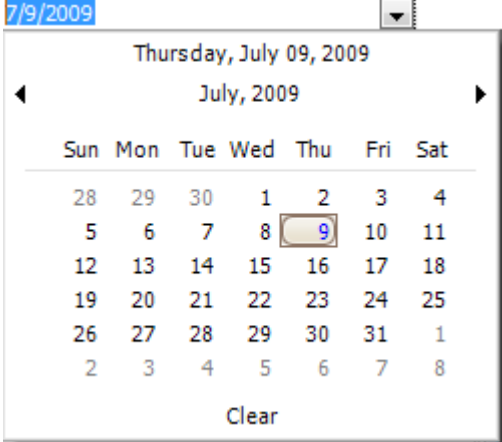
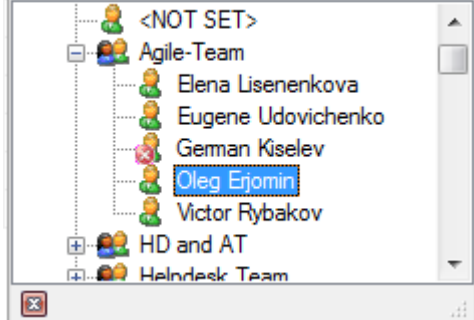
Caption

This column is used to give a caption for an item property. This caption will be displayed in the **Dimension View**, **Dimension Item** dialog, and in the WorkItem Explorer.

Type

The data type of a selected item property. The data type defines the editor kind, which will be used in **Dimension View** and the **Dimension Item** dialog.

The following data types are allowed to be used for Dimension Item Properties:

Data type	Editor
Boolean	
Integer	
Float	
String	
DateTime	
Resource ID	
Version ID	
Part ID	
WBS ID	
Dimension Item ID	

Options

Properties of some data type can have optional settings.

Data type	Settings
String	Length
Integer	Check Children Sum. If this option

	is set, then if sum of children item's values exceeds the parent's value, then such parent value is marked with red color.
Boolean	Hide if True. Agile-Team will hide Dimension Items with this Property set to True, when menu option View/Obsolete Items is set to OFF

Inheritance

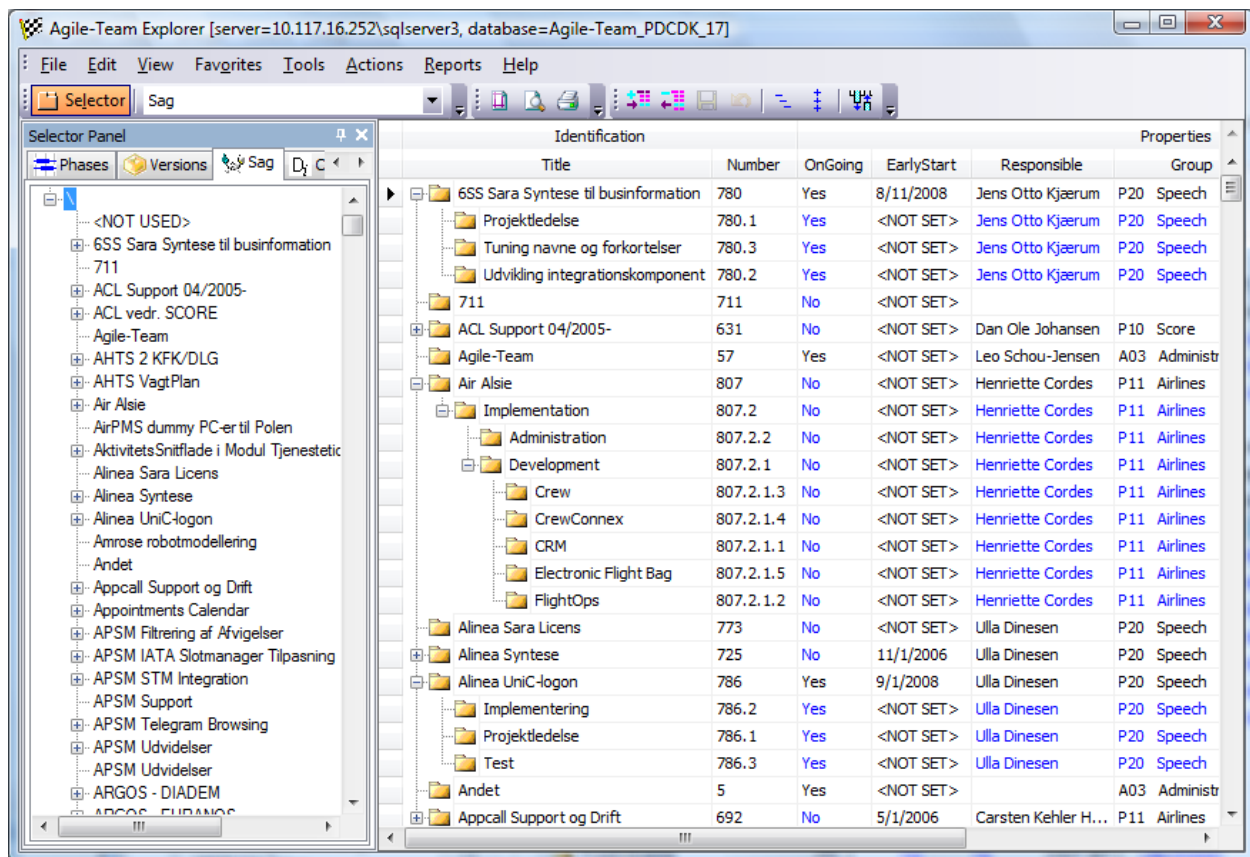
This flag indicates whether standard inheritance mechanism is applied to this property.

Explorer Column

Here you can select the [WorkItem Explorer](#) column where the selected property will be displayed in case of grouping by the given Dimension.

Dimension View

Agile-Team automatically generates a separate View for each user-defined Dimension.



Selecting the Dimension item in the Select View control of the Main toolbar, you can open the Dimension View. The Dimension View is a convenient tool for managing the Dimension. It is easy to

handle Dimension Item hierarchy in the Dimension tree. Simply Drag and Drop desired Dimension Item to the proper place.

Like other Views, the Dimension View contains **two** panes: **Selector** and **Data Pane**

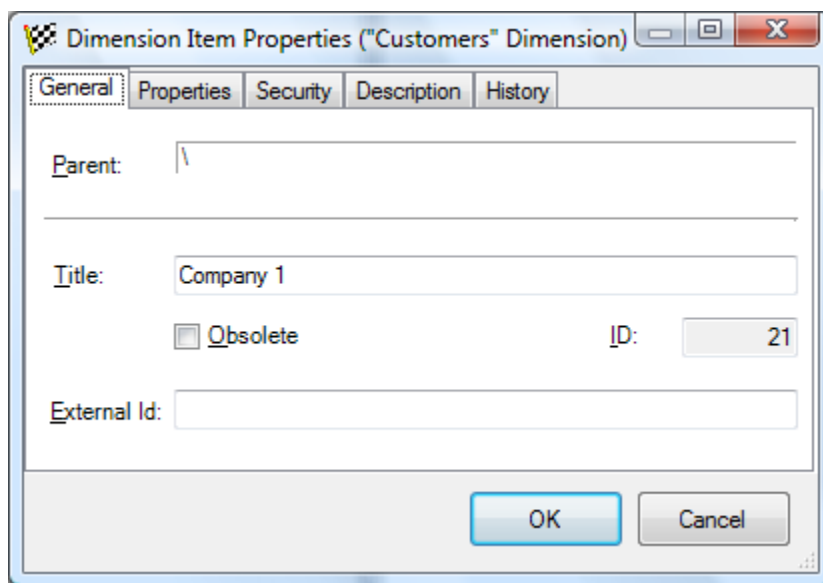
Columns in the data pane can display all Dimension Item properties. If you wish to modify some property value, you can simply click on the cell with this property and change its value using data type specific in-place editor.

Inherited values are marked with **blue** color.

Dimension Item Property Dialog

Another tool for inspecting and editing Dimension Item Properties is Dimension Item Property Dialog. It is invoked by double-click on Dimension Item either in Dimension View, or in Explorer's Dimension Tree. Also you can choose menu command "**File/Properties**" or context menu entry.

This dialog is used when you create new Dimension Item also.



This dialog has several tab pages.

General Tab

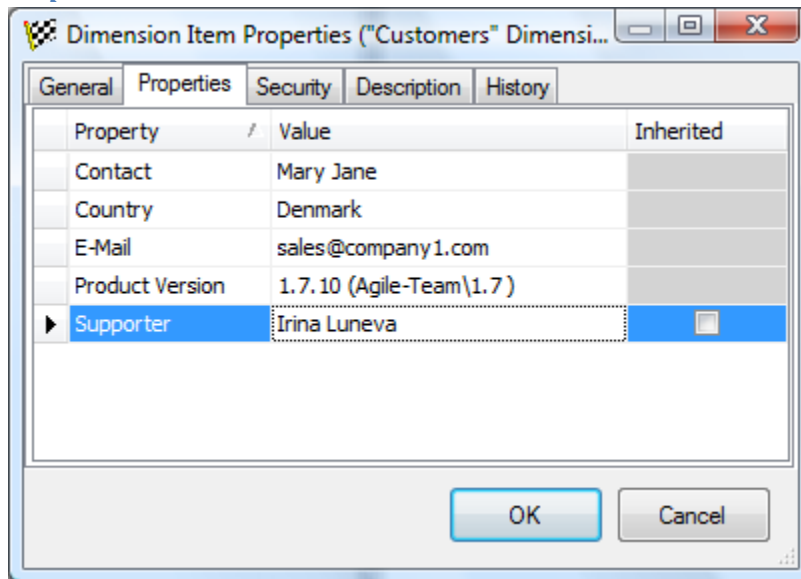
General Tab page shown at the picture above consist of fields that are common for all Dimensions:

Parent The full path to the parent item is displayed in this field.

Title In this field you can type Dimension Item Title.

Obsolete	This field indicates that selected Dimension Item is not relevant any more, but we need to keep it for some reason rather than delete it.
ID	A unique Identifier of the Item. It can be used for interfacing with other systems.
External ID	Optional string value that can be used for interfacing with another systems.

Properties Tab

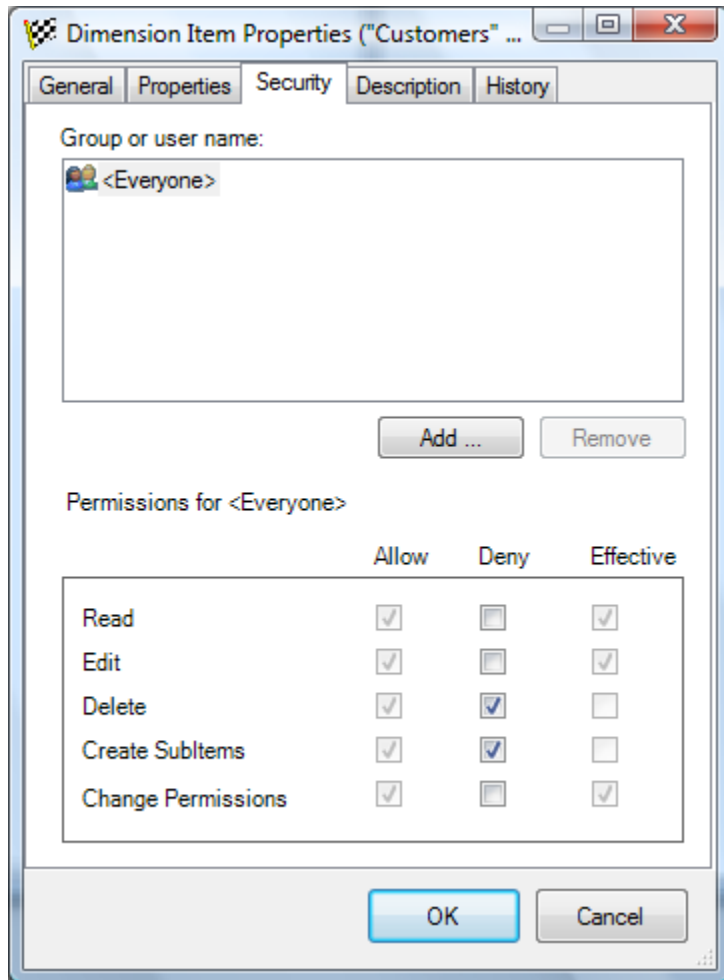


This tab page contains a property sheet, where all [custom properties](#) of Dimension Item are listed. This sheet has **three** columns:

Property	Displays the name of a property.
Value	This column contains an in-place editor that corresponds to property data type .
Inherited	For properties that support inheritance, this column contains a checkbox, that is used to set whether this property value is inherited from the parent or not. This column is works in conjunction with Value column. When Inherited box is checked ON, then Value column shows the parent's value. When you edit the Value column, then Inherited column is reset to OFF. This means that selected Dimension item overrides parent's value for given property.

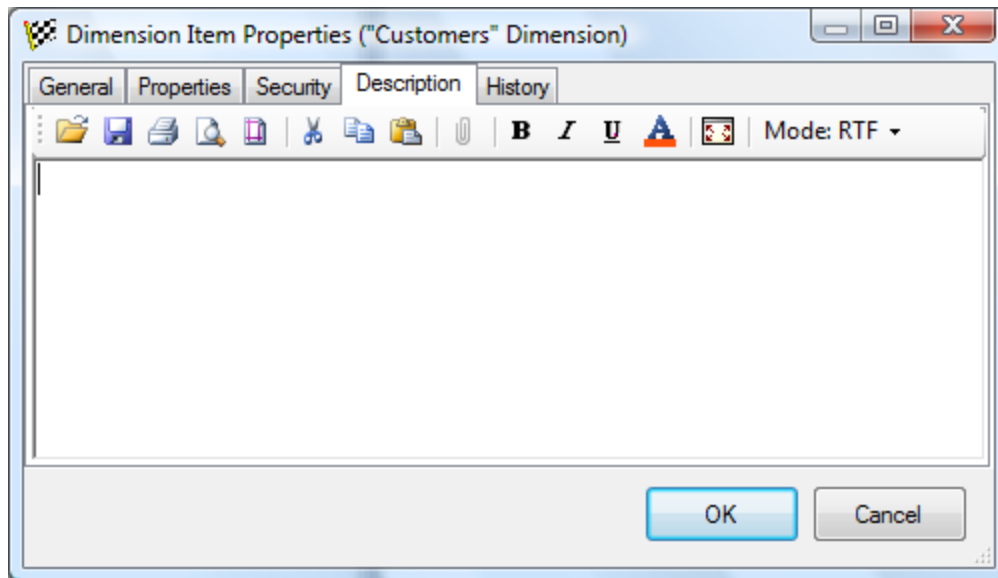
Permissions Tab

The **Permissions** Tab is used in order to set the access permissions on selected Dimension Item. Refer to [Permissions and Roles](#) chapter for detailed information about Agile-Team concepts.



Description Tab

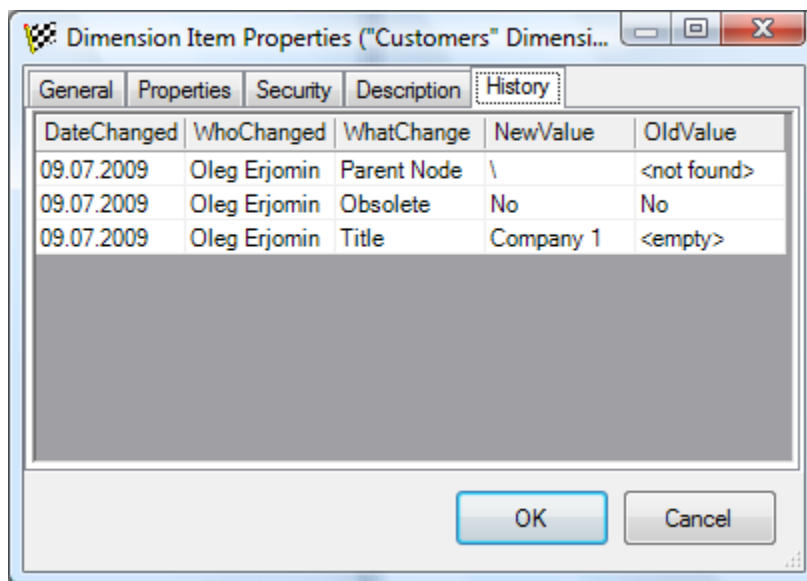
Description can contain any document associated with Dimension Item.



Description document can be one of the three supported formats: Plain Text, RTF, or Microsoft Word Document.

History Tab

All changes made for selected Dimension Item are tracked at the History tab.



Predefined Dimensions: Parts and Phases

Along with user-defined Dimensions, Agile-Team provides **two** predefined Dimensions: **Parts** and **Phases**. In many aspects, Parts and Phases work like all another Dimensions but have some specifics.

The **Parts** hierarchy can be used to register an extra dimension for Projects and WorkItems. The Parts hierarchy is usually used to model the architecture of applications. For example, using the Parts hierarchy can make it possible to see all works being done on the **Install Program** across multiple

releases of a Project. Parts can be used to structure where bugs are located. The Part hierarchy is especially useful in 'large' software products. One of the utilizations of Parts is that Helpdesk Release Notes and Knowledge base articles that are generated from Agile-Team are grouped by Parts.

Other dimension of software Project management models is Phases. Each WBS node (Project item or WorkItem) can be linked to some Phase.

Phases are else one Dimensions. Usually software Projects are divided into several **Phases** to improve Project management. Each Phase groups some works of the project. Usually each Phase is linked to completion of some important Project outputs. It is possible to model various development cycles with Phases. For example, if developer team follows popular SCRUM methodology, then Phases will correspond to Sprints.

Phases are significant for planning algorithm, because it allows prioritizing WorkItems by time periods.

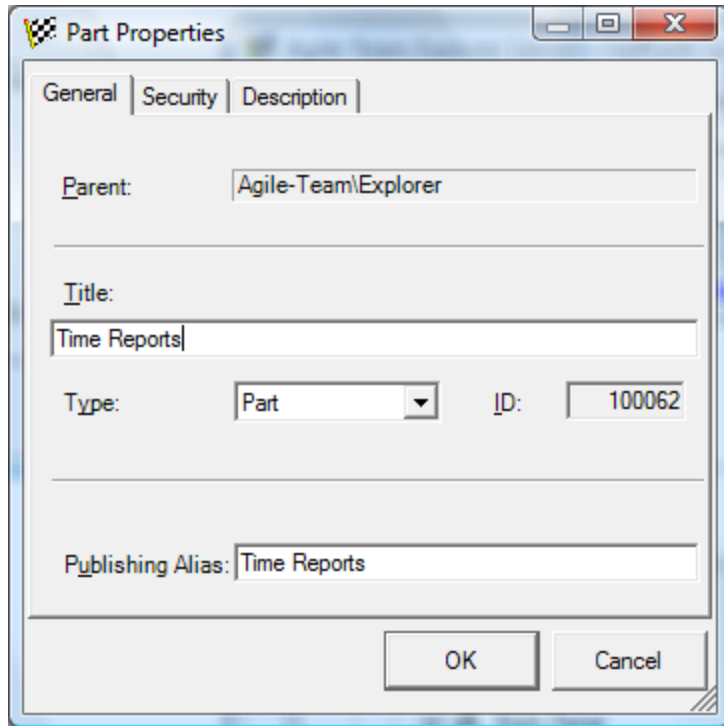
In contrast with user-defined Dimensions, both Parts and Phases have fixed set of properties. These properties can be inspected and edited either via specialized views or using Part or Phase Property dialogs.

Specific Menu Commands for Parts and Phases

Operation	Menu Command	Shortcut Key
Create New Part	File/New/Part	Ctrl+Shift+P
Create New Part Group	File/New/Part Group	Ctrl+Shift+U
Create New Phase	File/New/Phase	Ctrl+Shift+H
Create New Phase Group	File/New/Phase Group	Ctrl+Shift+O

Part Properties

Part properties can be inspected and edited using the following Dialog.



Parent	Full path to the parent item is displayed in this field.
Title	Name of the Part
Type	Type of Phase node. Can be one of: Product, Part, or Group
ID	Unique Identifier of the Item. It can be used for interacting with other systems.
Publishing Alias	If this field is not empty, it is used by Helpdesk Release Notes, and Knowledge base as article group header. Example is shown at the picture below. Here Compiler, Library , etc. are the Publishing Aliases of the Visual Prolog Product Parts.

Visual Prolog Knowledge Base

Search result: 17 articles found.

Compiler

- [Compiler hangs in type analysis for some anyflow predicates \(ID:42713, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)
- [The test can be wrongly removed \(ID:42802, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)
- [Unexpected reports about single facts being not initialized \(ID:42813, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)
- [System exception for an optimized last call to an object predicate with string arguments \(ID:42837, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)
- [Integral values with sizes less than 32bits are actually compared as 32bits values \(ID:42839, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)
- [Compiler: Integral overflow exception during static calculations for some constants expressions \(ID:42858, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)
- [Internal error for using of an object qualified property in the predicate isErroneous/1 \(ID:42971, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)
- [Wrong detection of unreachable code and a variable that is not always bound \(ID:43032, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)
- [Compiler dump on heap exhaust \(ID:43095, Type: BUG, Fixed in: 7.2.7202\)](#)
- [Predicates-from and interface delegation does not work together \(ID:43122, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)
- [Too slow compilation \(ID:43242, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)

Examples

- [ESTA demo example: incorrect types for some new parameters \(ID:42788, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)

Library (PFC)

- [The predicates time::setWeek/2 and time::getWeek/2 do not work properly for certain locales \(ID:42643, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)

Runtime Errors

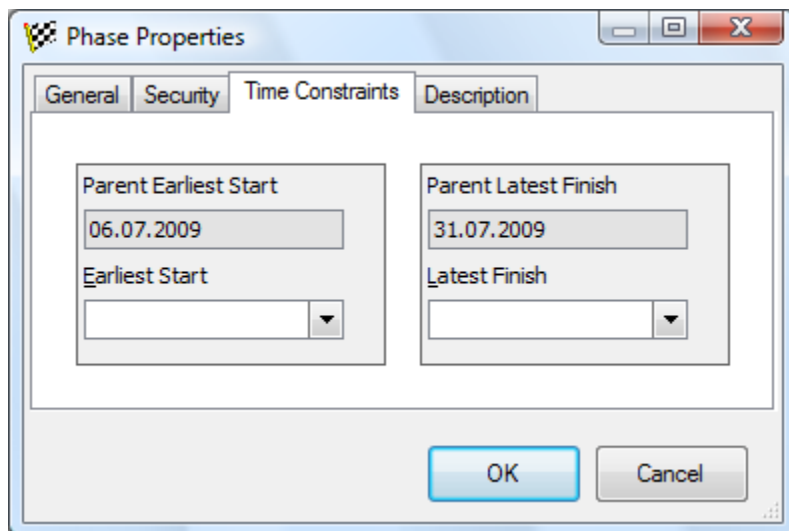
- [Access violation exception on loading DLL \(during symbols initialization\) \(ID:42786, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)
- [Incorrect results on conversion from the unsigned64 type \(ID:43253, Type: BUG, Fixed in: Internal Version,7.2.7202\)](#)

Phase Properties

Phase Properties dialog is used in order to inspect or edit Phase nodes. Specific Phase properties are at General and Time Constraints pages

The screenshot shows the 'Phase Properties' dialog box with the 'General' tab selected. The 'Parent' field is set to 'Agile-Team\1.7 Stage II'. The 'Title' field is 'MS1'. The 'Type' is set to 'Phase' in a dropdown menu. The 'Manager' field shows '<NOT SET>'. The 'External ID' field is empty. The 'ID' field is '32'. At the bottom, there are 'OK' and 'Cancel' buttons.

Parent	Full path to the parent item is displayed in this field.
Title	Name of the Phase
Type	Type of Phase node. Can be one of: Phase, Group
Manager	Phase Manager. When SCRUM is used, it is Sprint master.
ID	Unique Identifier of the Item. It can be used for interfacing with other systems.
External ID	Optional string value that can be used for interfacing with other systems.



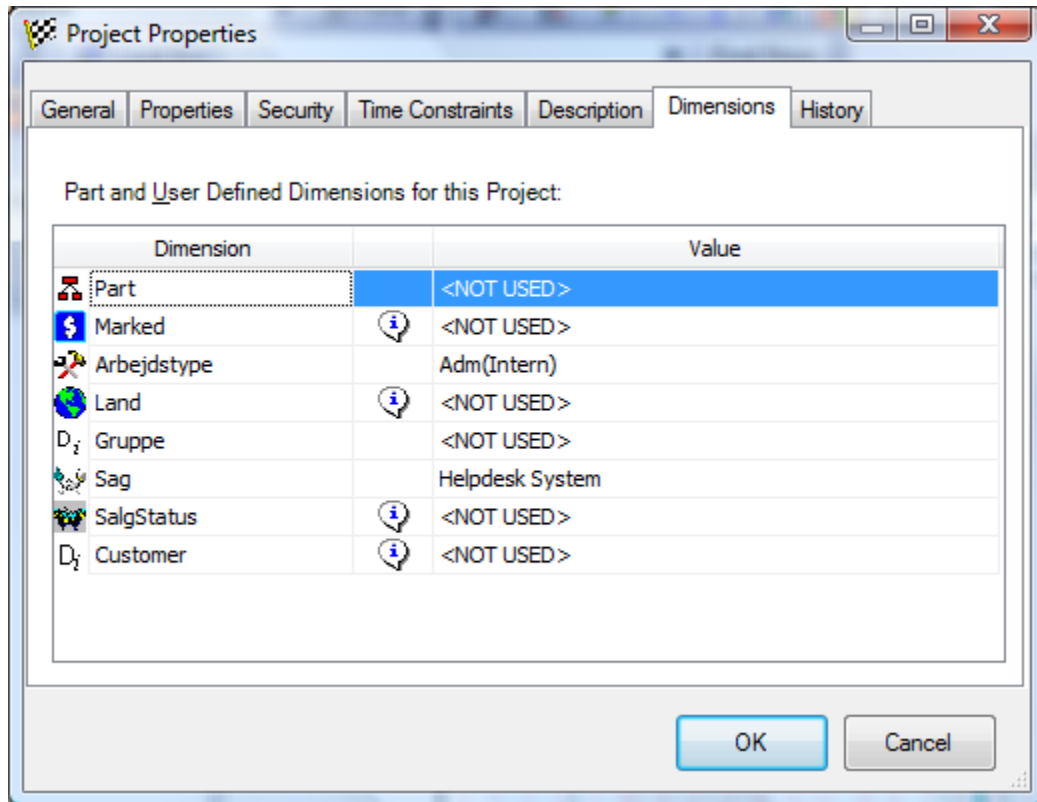
Earliest Start Defines the date that the planning subsystem takes into account as the starting date for Phase scheduling. If the **Earliest Start** is specified, then WorkItems that are linked to the selected Phase will not be scheduled to start before this date.

Latest Finish Latest Finish is not taken into account for the planning algorithm, but if the calculated Finish is later than Latest Finish this field will be marked **red** in the Explorer and seen on the Gantt (conflict areas).

When dialog is submitted, Agile-Team checks that Time Constraints of current Phase fit constraints of the parent Phase. Phase property dialog shows parent values for Time Constraints in order to help you set right time range.

Connecting WBS Items to Dimensions

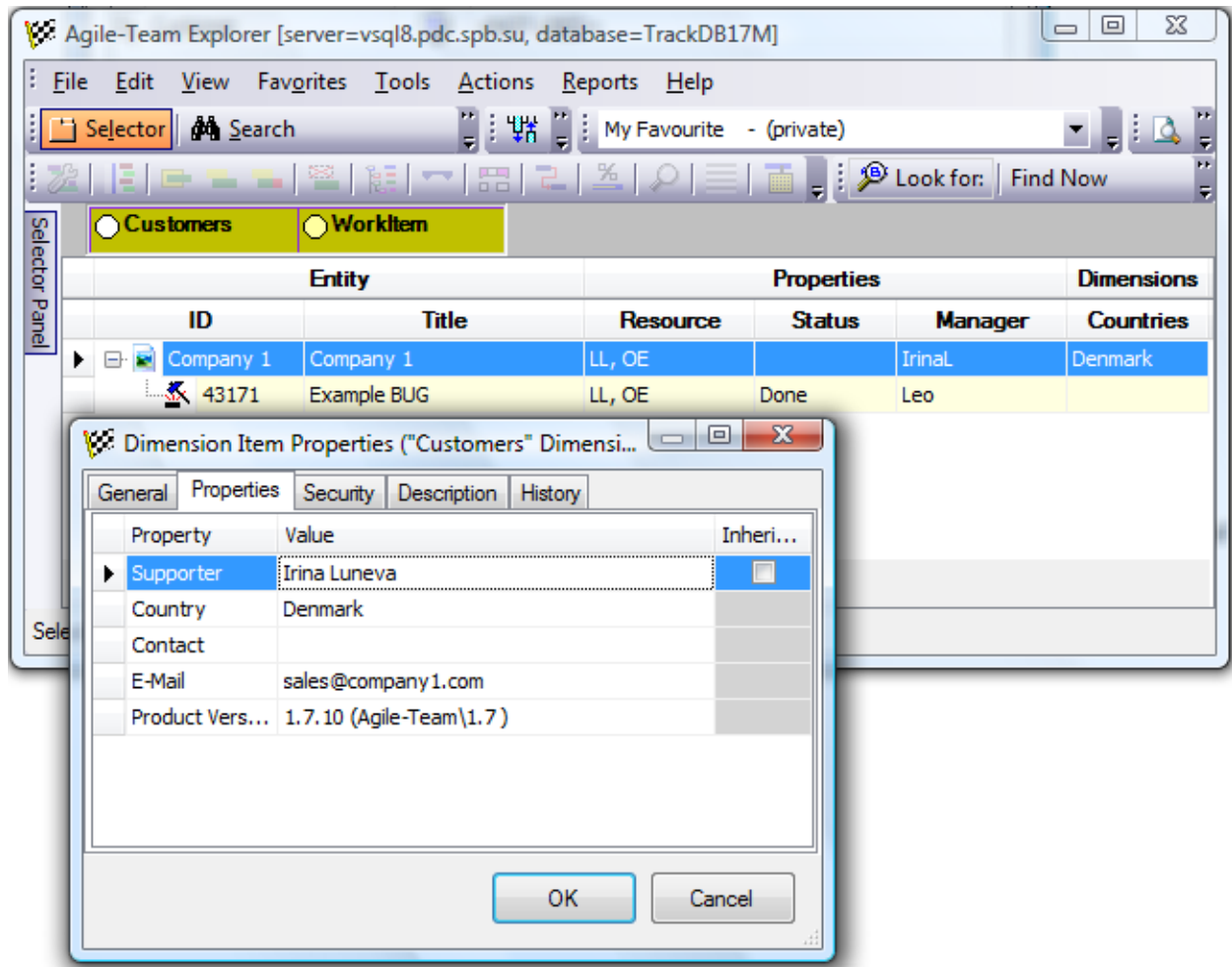
Both Projects and WorkItems can be linked to any predefined and Custom Dimensions. Use “**Dimension**” pages in Project Property or WorkItem dialogs in order to set up such relationships.



WorkItem Explorer Dimension Column

WorkItem Explorer Column Picker contains entries for each of user-defined Dimensions. WorkItem Explorer will show columns in **Dimension** tab for each Dimension that is checked to be shown. These columns will display Titles for Dimension Items linked to WorkItems or Projects.

Like other columns, Dimension columns allow sorting and grouping. As we described above, custom Dimension property can have “Explorer Column” attribute. If you set grouping by some Dimension, and some of custom properties of this Dimension have corresponding “**Explorer Column**” set, then this property value will be displayed in this WorkItem explorer columns.



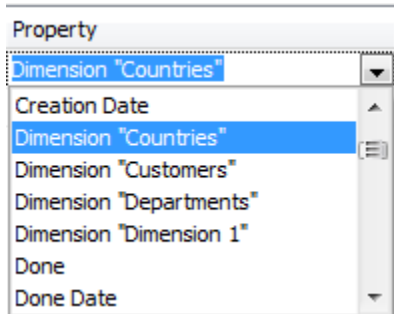
Take a look at the example above. User-defined Dimensions **Countries** and **Customers** are selected to be shown in the WorkItem Explorer. WorkItem 43171 is linked to the item “Company 1” of the **Customers** Dimension. This Dimension has the **Supporter** property to be shown in Explorer **Manager** column, and grouping by this Dimension is set.

The **Customers** dimension is linked with the **Countries** Dimension in turn.

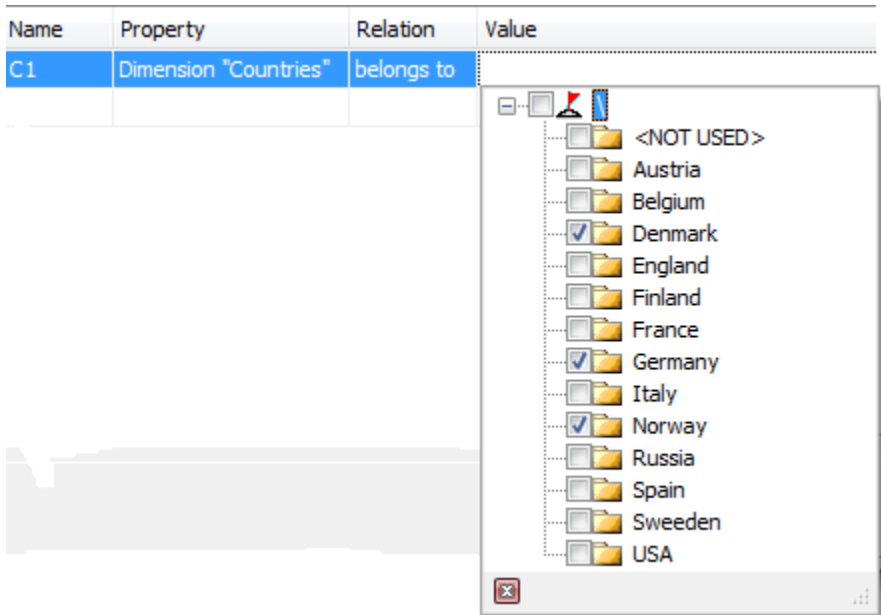
You can see that the **Countries** column displays value for this property of Dimension “Customers” and column “Manager” displays value of property “Supporter”.

Using Dimensions in Filters

It is possible to filter by any user-defined Dimension registered in Agile-Team.



Filters support three relations for custom Dimensions: **equal**, **not equal**, and **belongs to**. The filter field value can be set using drop-down control, which allows selection from Dimension tree.



Planning

Planning as it is considered by Agile-Team is a process of assigning resources, order and time to the work items.

Agile-Team **Planning** subsystem assumes **three** levels involved in Scheduling:

- 1. Some level in Management Allocates Resources to the Projects.
- 2. The Project Manager then assigns Resources to the WorkItems, and gives the priorities of these.
- 3. The Developer does usually have some freedom in the order of performing the WorkItems.
- 4. The planning for the project is normally done by the Project Manager who assigns resources to the WorkItems in the project, and decides which order the WorkItems should be carried out.

There are several ways to specify the ordering of the WorkItems. In some projects work are done in phases/iterations. The planning here is mainly to decide which phase the WorkItems should be done in,

the ordering within the phases are sometimes not so important, other times ordering within a phase are done by giving the WorkItems a priority. In some situations the ordering are done by specifying predecessors or links to other work items, which must be completed before the next one can start

The Project manager has a number of constraints he can set for the project to control the work order of the estimated activities:

- Deciding which Resources to assign to the Activities.
- Assigning priorities to the WorkItems.
- Specifying predecessors.
- Specifying EarlyStart and/or LateFinish.
- Grouping the WorkItems into phases.

How to Create a Plan?

Calculating a plan in Agile-Team is very simple: just call menu item “Actions -> Planning”! The plan calculation is done simultaneously for all the Projects. So all Planning results are up-to-date, right after you invoke the Planning menu.

Another aspect is that to do Planning, you have to prepare for : creating Projects and WorkItems, assigning Resources, make time estimates, specify WorkItem Priorities and which Phases they belong to, etc. Finally it is needed to specify how and when resources are allocated to the projects (which are sometimes called as Resource contracts).

The plan can be visualized by means of Explorer columns “Start”, “Finish”, “Planned”, “UnPlanned”, “Resource” and the **Gantt Pane**.

How will Agile-Team calculate a plan?

Agile-Team schedules WorkItems for a given Resource in a sequence controlled by:

1. Resource Allocation Pane. (See: **Resource Allocation Pane**)
This is a list specifying the order in which to work on the projects, when to start and stop, and the work load for these assignments.
2. Predecessors to a WorkItem: use WorkItem dialog “Predecessors” tab or Predecessors Assignment in Explorer (menu Actions -> Start Predecessors Assignment (F11)). See chapter “**Predecessors**”.
3. Phase of WorkItem: use WorkItem dialog “Time Constraints” tab or see column “Phase” in Explorer. See chapter “**Phases**”.
4. WorkItem Priority: use WorkItem dialog or see column “**Priority**” in Explorer.
5. WorkItem EarliestStart/LatestFinish: use WorkItem dialog “Time Constraints” tab or see columns “EarlyStart” and “LateFinish” in Explorer.

When all the above priorities are the same for a set of WorkItems, these WorkItems will get the same Start and Finish values.

The plan algorithm for each Resource will look into the Agile-Team Calendar for this Resource and find out how many hours per day the Resource works, taking holidays into account.

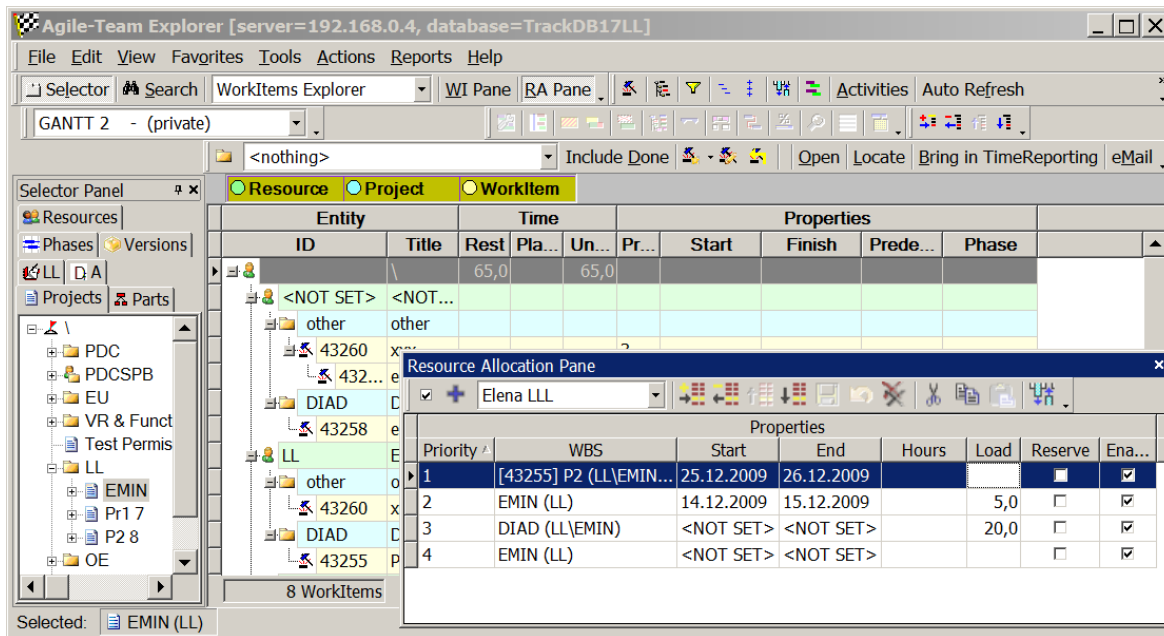
Note: Agile-Team will never plan more hours per day for a Resource than is specified in the Resource's Calendar.

The Resource Allocation Pane

Resource Allocations are the foundation of the Planning algorithm. They specify which Projects (or groups of tasks), in what order, with what limitations, in what time frames, a Resource should work on.

Resource Allocation Pane (RAP) consists of **Resource Allocation Records** (RAR) that are processed by Planning algorithm one by one in RAR.Priority order. RARs now exist only for single Resources, and not for Resource Groups.

To work with the RAP use the menu item: "View-> Resource Allocation Pane" or toolbar button . Then choose the Resource in the Selector or in the Resource Picker:



RAR Properties (= RAP columns)

Priority: specifies the order in which RAR will be processed by Planning algorithm.

WBS: specifies a node in WBS tree, which can be a Project node or a single WorkItem or even may be "not set" (empty value). It defines a group of tasks (**Job**) to be scheduled.

Start, End: set fixed dates interval when the Resource is allocated to the **WBS** node. Both values are optional.

Load: Load specified in hours per week for the Allocation.

Hours: Hours to spend on this Allocation.

Reserve. This flag works with non-zero **Load** or **Hours**. Even if there are not enough assigned WorkItems in **WBS** node, these “**Load**” or “**Hours**” hours will be subtracted from Resource available weekly working time.

Comment: any text

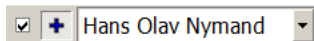
EnteredBy, EnteredDate: who made the last changes and when

Enabled: if unchecked, this RAR does not participate in Planning.



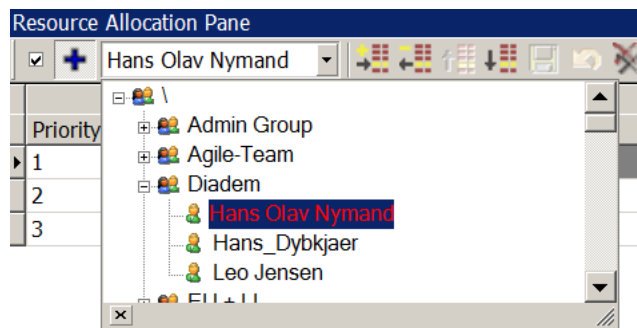
Used to create and delete records, to move allocation up and down in priority, to save or cancel changes. Here you can also choose the Resource, whose Allocations are observed.

How to Choose a Resource, whose Allocations Are Observed ?



It can be done either in the Resources tree of the Selector or in the Resource Picker.

The check-box on this picture defines which mechanism is used to select: when it is checked, the Resource Picker is used, when unchecked, use the Resources tree of the Selector.



 button defines whether to include Resource Group nodes into drop-down tree of the Resource Picker.

How to Create a RAR ?

- By means of toolbar button  (shortcut Insert), An empty RAR is created with lowest priority.

- By main menu item “File -> New -> Resource Allocation Record”. An empty RAR is created with lowest priority.
- By menu item “Add node before current” in popup menu of an existing RAR.
- By drag-dropping of a Project node from Selector to RAP. In such case a RAR is created with a preset property “WBS”. When you drop on the empty space below all records, a new RAR is created with lowest priority. When you drop on an existing RAR, a new RAR is inserted before the target RAR.

How to Delete a RAR ? (del All also)

- By means of toolbar button  (shortcut Delete): currently selected RAR.
- By menu item “Delete Item” in popup menu of a RAR.
- All RARs can be deleted by toolbar button .

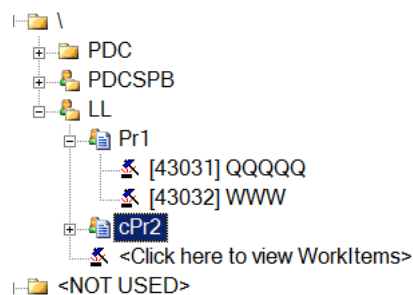
How to Change RAR Priority ?

- By means of toolbar buttons   (shortcuts Ctrl-Alt-Up, Ctrl-Alt-Down). Currently selected RAR is moved up or down appropriately.
- By menu items “Move Item Up” and “Move Item Down” in popup menu of a RAR.
- By drag-dropping a RAR on another RAR. Dropped RAR is placed before the target RAR.

How to Change RAR Properties ?

All RAR properties (except Priority) are changed by means of in-place editors. Just click or press Enter key on the selected cell.

WBS-node Editor:



It is a drop-down tree of Project nodes and WorkItems. Initially WorkItems are not visible in the tree, instead of that dummy nodes are inserted under each Project node (“Click here to view WorkItems”). When you click on such node, a list of child-WorkItems appears.

On the picture above, a dummy node is under “cPr2” Project node. A list of child-WorkItems is under “Pr1” Project node.

You can select either Project node or WorkItem node by double-clicking.

How To Save Changes ?

- By selecting of another RAR
- By means of toolbar button “Save” .
- By clicking on Node Indicator (left-most field of a record) of a currently changed RAR. It is highlighted by Aquamarine color:

2	Pr1 (LL)	<NOT SET>	<NOT SET>	10,0
3	cPr2 (LL)	03.06.2009	06.06.2009	2,0
4	cPr2 (LL)	11.06.2009	12.06.2009	

- When you switch to another Resource or go to another View or close Application.

How to Cancel Changes ?

By means of toolbar button “Undo Changes” .

How to deactivate (disable) a RAR ?

A RAR can be deactivated (disabled), so it won’t participate in Planning algorithm. It is done by means of a value in “Enable” column. Deactivated RAR is dimmed.

Copy, Cut, Paste a RAR

There are Cut/Copy/Paste operations with RARs. It is done by means of toolbar buttons and in a popup for a RAR. .

A copied RAR can be pasted to another Resource.

How to Move/Copy a RAR to another Resource ?

- Drag a RAR to Resource tree in Selector and drop on a single Resource node. Drag operation with pressed Ctrl key copies a RAR, otherwise a RAR will be moved.
- Use Cut/Copy/Paste functionality. .

Permissions in the Resource Allocation Pane ?

(There are currently no permissions for RAP).

Resource Allocation Samples

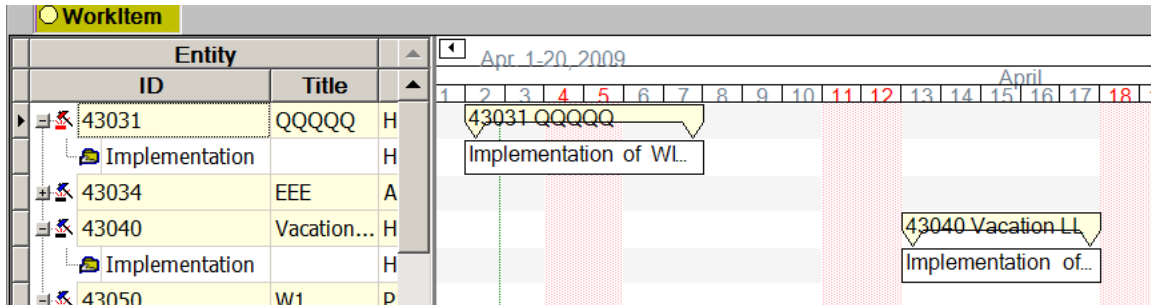
???

Allocation with Fixed Dates

Some tasks are needed to be scheduled to specified fixed dates, for example vacation (yes-yes, it is a task also). Put a RAR describing this task as a 1st Priority task:

Properties							
Priority ^	WBS	Start	End	MaxLoad	MaxHours	Reserve	E...
1	[43040] Vacation LL (LL\Vacation)	13.04.2009	17.04.2009			☐	☒
2	Pr1 (LL)	<NOT SET>	<NOT SET>			☒	☒

The result in Explorer:



Allocation of a sub-Project with a Higher Priority

There is a Project EMIN with a sub-Project DIAD that has higher priority than other sub-Projects and Tasks of EMIN. We want that a Resource LLL starts working on the DIAD just now, spending at least 1 hour per week. When he finishes most-prioritized DIAD tasks, he can proceed normally with all EMIN tasks.

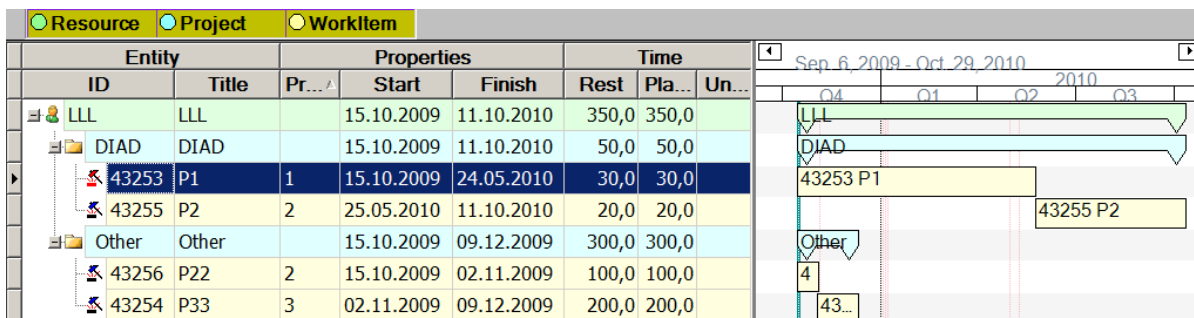
There is no straightforward method to define such rule in RAP, but you can choose a workaround.

This is straightforward attempt:

Properties							
Priority ^	WBS	Start	End	Load	Hours	Reserve	Ena...
1	DIAD (LL\EMIN)	<NOT SET>	<NOT SET>	1,0		☐	☒
2	EMIN (LL)	<NOT SET>	<NOT SET>			☒	☒

Here both WorkItems of the DIAD (43253 "P1" and 43255 "P2") are scheduled by RAR 1.

The planning result is very bad: the tasks from DIAD are spread for a year. And the planned Finish for the all LLL's tasks is 11.10.2010:



Workaround : to set some **End date** for the RAR 1. Here we set a date Today + 2,5 months:

Properties							
Priority ^	WBS	Start	End	Load	Hours	Reserve	Ena...
1	DIAD (LL\EMIN)	<NOT SET>	31.12.2009	1,0		☐	☒
2	EMIN (LL)	<NOT SET>	<NOT SET>			☒	☒

Here the WorkItem 43253 “P1” is scheduled partly by RAR 1 and partly by RAR 2. The second WorkItem of the DIAD (43255 “P2”) is scheduled completely by RAR 2.

The result is much better:

Entity							
ID	Title	Pr...	Start	Finish	Rest	Pla...	Un...
LLL	LLL		15.10.2009	31.12.2009	350,0	350,0	
DIAD	DIAD		15.10.2009	31.12.2009	50,0	50,0	
43253	P1	1	15.10.2009	31.12.2009	30,0	30,0	
43255	P2	2	19.10.2009	10.11.2009	20,0	20,0	
Other	Other		19.10.2009	16.12.2009	300,0	300,0	
43256	P22	2	19.10.2009	10.11.2009	100,0	100,0	
43254	P33	3	10.11.2009	16.12.2009	200,0	200,0	

“Reserving time” for Tasks that Are not Estimated

You can reserve a buffer for some various tasks which are not convenient to plan, for example everyday management, support etc.

Such “reserving” records must precede other records, except records with fixed dates.

The sample below reserves 1 hour per day (5 hours per week) for consulting users on the Project “AgileTeam”. Pay attention that the “Reserve” flag is set. Even if there are no assigned WorkItems in “User Support” Project, these 5 hours will be subtracted from the available weekly working time. So, WorkItems from the Project “Pr1” will be scheduled based on 7 hours a day (presuming 8 hours per day Calendar).

Properties							
Priority ^	WBS	Start	End	MaxLoad	MaxHours	Reserve	
1	User Support (PDC\Agile-Team\ORG)	<NOT SET>	<NOT SET>	5,0		☒	
2	Pr1 (LL)	<NOT SET>	<NOT SET>			☐	

An example: Detailed spec of reserving time

Priority ^	WBS	Start	End	MaxLoad	MaxHours	Comment	Reserve
1	Fravær	16-03-2009	22-03-2009			Ferie	☐
2		09-03-2009	15-03-2009	12,0		Fravær	☒
3		<NOT SET>	<NOT SET>	7,5		Diverse	☒
4		<NOT SET>	<NOT SET>	5,0	20,0	Booking aflevering	☒
5	F09 (Aviation\Airports\Misc\Apcal Support og Drift\Apcal Support)	<NOT SET>	<NOT SET>				☐

Another example: specifying the order to work on projects

Priority /	WBS	Start	End	MaxLoad	MaxHours	Comment	Reserve
▶ 1	Fravær	25-05-2009	29-05-2009				☐
2	Fravær	06-07-2009	17-07-2009				☐
3		<NOT SET>	<NOT SET>	7,5		Reserve time for planning	☒
4	Merge 8.4 (Eminental\Konsortium\2009 Consortium\...	<NOT SET>	<NOT SET>				☐
5	CBRN (Eminental\Argos)	<NOT SET>	<NOT SET>				☐
6	Eminental	<NOT SET>	<NOT SET>				☐

The Basis for Planning: WorkItems with Estimates

When the Agile-Team plan algorithm is running it will take into account only WorkItems that have Activities assigned to a Resource (single or Group), and have an estimate bigger than zero.

WorkItems with higher priority are scheduled before WorkItems with lower priority. (If they are involved in the same Resource Allocation, Phases are the same and no predecessors are involved).

Both Active and Inactive WorkItems are taken into account; but if all other priorities are the same then active WorkItems will be scheduled before inactive.

Using Phases for Planning

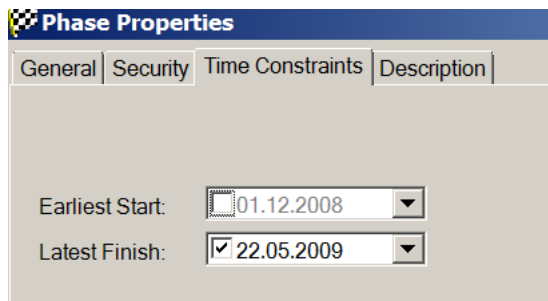
Each Project node and WorkItem has property *Phase*, although it can have **<not set>** value.

Phases constitute a tree, as other Dimension trees, and this tree is located in the Selector.

Phases can be used to specify some sequential steps by which a Project is to be performed.

Sibling *Phase* nodes on each level are arranged in the **order** defined by user (manager). The order can be changed by Up/Down operations (buttons  in the Trees toolbar or in popup menu for a *Phase* node).

A *Phase* has properties EarliestStart and LatestFinish that specify time period for this *Phase*:

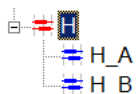


The image shows a 'Phase Properties' dialog box with four tabs: General, Security, Time Constraints, and Description. The 'Time Constraints' tab is selected. It contains two date pickers: 'Earliest Start' set to '01.12.2008' and 'Latest Finish' set to '22.05.2009' with a checkmark in the selection box.

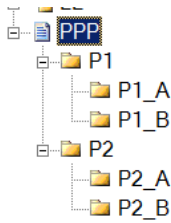
Note: the order of *Phases* and their EarliestStart/LatestFinish dates are not coordinated, i.e. no checking is done that previous *Phase* has less dates than next *Phase*.

Example: Using Phases to combine two projects

Let's have Phases:



And Projects:



We want to accomplish "...A" sub-Projects in the Phase H_A and "...B" sub-Projects in the Phase H_B. So we set:

PPP.Phase = H, P1_A.Phase = H_A, P1_B.Phase = H_B, P2_A.Phase = H_A, P2_B.Phase = H_B

Resource Allocation Pane contains only 1 Project "PPP":

Properties							
Priority	WBS	Start	End	MaxLoad	MaxHours	Reserve	E...
1	PPP	<NOT SET>	<NOT SET>			☐	☒

See that WorkItems from Phase H_A are planned before WorkItems from Phase H_B:

WorkItem							
ID	Title	Start	Finish	Project	Phase	Pr...	Rest
43066	W1A	14.04.2009	17.04.2009	P1_A (PPP\P1)	H_A (H)	4	10,00
43067	W1B	17.04.2009	22.04.2009	P1_B (PPP\P1)	H_B (H)	4	16,00
43068	W2A	14.04.2009	17.04.2009	P2_A (PPP\P2)	H_A (H)	4	20,00
43069	W2B	17.04.2009	22.04.2009	P2_B (PPP\P2)	H_B (H)	4	8,00

Same, but grouped by Phases:

Phase							
ID	Title	Start	Finish	Project	Pr...	Rest	Un...
H	H	14.04.2009	22.04.2009			54,00	
H_A	H_A	14.04.2009	17.04.2009			30,00	
4...	W1A	14.04.2009	17.04.2009	P1_A (PPP\P1)	4	10,00	
4...	W2A	14.04.2009	17.04.2009	P2_A (PPP\P2)	4	20,00	
H_B	H_B	17.04.2009	22.04.2009			24,00	
4...	W1B	17.04.2009	22.04.2009	P1_B (PPP\P1)	4	16,00	
4...	W2B	17.04.2009	22.04.2009	P2_B (PPP\P2)	4	8,00	

Using EarlyStart and LateFinish for Planning

If EarlyStart is specified for a WorkItem, it will not be scheduled to start before this date.

LateFinish is not taken into account for the planning algorithm, but if the calculated Finish is later than LateFinish this will be marked **red** in the Explorer and seen on the Gantt (conflict areas).

Both EarlyStart and LateFinish of the WorkItem can be inherited from the parent WBS node or from Phase to which WorkItem belongs. Planning algorithm takes into account the latest of these EarlyStart values.

Using Predecessors for Planning

The screenshot displays the Agile-Team Explorer interface. The top pane shows a tree view of WorkItems. The 'Predecessors' column for WorkItem 30614 is highlighted with a red circle. The bottom pane shows the 'View Mode' for WorkItem 30614, where the 'Predecessors' tab is selected and highlighted with a red circle. The Gantt chart on the right shows the timeline of tasks, with red arrows indicating dependencies between tasks 30614 and 30616.

Entity ID	Predecessors	Time Rest
Administration		32,0
24887 Accept te...		32,0
WorkPackage 1		120,0
30608 AAA		10,0
30609 BBB		6,0
30610 CCC		12,0
30611 DDD	30610	12,0
30612 EEE	30611, 30608	20,0
30613 FFF	30612, 30615	10,0
30614 GGG	30609	10,0
30615 HHH	30614	20,0
30616 III	30611, 30610	20,0

For each WorkItem it is possible to specify which WBS items should be completed first. In the WorkItem Dialog and Pane, there is a TAB that lists the predecessors, and the WI Explorer has a column that can show the predecessors for a WorkItem.

The Gantt Pane can show how the WorkItems are linked together.

Note: Be very careful about the use of predecessors. It is usually better to control planning by Phases or resource allocations. Heavy use of predecessors can make it difficult to figure out planning problems.

How to View Planning Results?

You can see Planning results in Explorer columns "Start", "Finish", "Planned", "UnPlanned", "Resource" and the **Gantt Pane**. Also you can observe that not all Rest hours are successfully scheduled – by means of "Management Needed" column.

Explorer Columns

"Start" and "Finish" columns

Values in “**Start**” and/or “**Finish**” columns may be empty, it means that this node does not participate in Planning (when both values are empty) or appropriate dates cannot be calculated for some reason. (In these cases you should check that Resources are assigned, estimates are given and there exists Resource Allocation Records that allocates Resources to the WorkItems.)

Values in “**Start**” and “**Finish**” columns sometimes are **red**. Also, in this case, values in “**EarlyStart**” and “**LateFinish**” columns are red. It means that there is conflict: **Finish is after LateFinish**.

“Planned” column

The “**Planned**” column (in the Time band) shows how much time is scheduled to Resource(s) from the “**Resource**” column .

“UnPlanned” column

The “**UnPlanned**” column (in the Time band) shows how much time remains unscheduled.

“Resource” column

The content of “**Resource**” column is extended by the additional list of Resources that are scheduled to an Activity. So, the “**Resource**” column contains Resources that have TimeReports on this item and those that are scheduled to this item.

It is a summary column, i.e. values are merged up the grouping nodes.

Picture 1:

WorkItem										
Entity		Time			Properties					
ID	Title	Rest	UnPla...	Plan...	Assi...	Resource	Start	Finish	FirstTR...	LastTRD...
43098	bg	29,38	7,38	23,00	LL+ES	DenisD, ES, LL, LL+ES	09.10.2009	13.10.2009	17.07.2009	10.09.2009
	Implement...			15,00	LL+ES	LL	12.10.2009	13.10.2009	17.07.2009	17.07.2009
	Implement...			8,00	LL+ES	ES	09.10.2009	09.10.2009		
	Implement...				LL+ES	DenisD			10.09.2009	10.09.2009
	Implement...	29,38	7,38		LL+ES	LL+ES				
43103	c	9,00		9,00	LL	DenisD, LL	09.10.2009	12.10.2009	24.07.2009	27.07.2009

The Assigned Resource is a Resource Group “**LL+ES**”, which consists of 2 single Resources **LL** and **ES**.

There are 4 nodes for “**Implementation**” Activity of the WorkItem 43098:

For Resource **LL** – it is planned and has TimeReports already

For Resource **ES** – it is planned and has no TimeReports

For Resource **DenisD** – it is not planned, but has TimeReports

For Group Resource **LL+ES** (it is Assigned Resource) – it is not planned, because only single Resources participate in Planning. It has non-zero Rest value. Also unplanned remainder is placed into

“**Unplanned**” column for this Resource.

Pay attention that on the WorkItem level Rest = Planned + Unplanned.

Grouping by Resource column:

Grouping by Resource column is allowed.

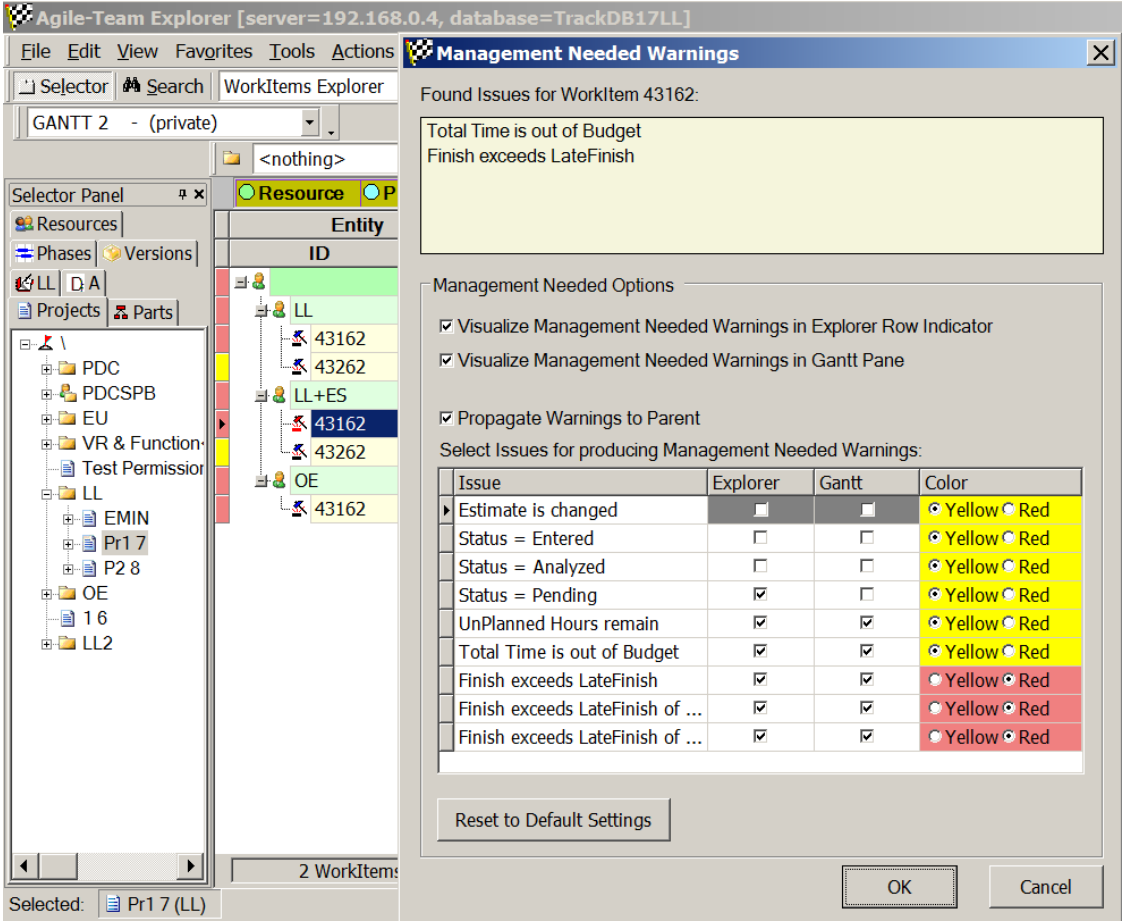
On this picture you can see grouping by Resource for data in above picture:

Resource WorkItem										
Entity		Time			Properties					
ID	Title	Rest	UnPla...	Plan...	Assi...	Start	Finish	FirstTR...	LastTRD...	
DenisD	De...				LL, L...			24.07.2009	10.09.2009	
43098	bg				LL+ES			10.09.2009	10.09.2009	
Implem...					LL+ES			10.09.2009	10.09.2009	
43103	c				LL			24.07.2009	24.07.2009	
ES	Eliz...			8,00	LL+ES	09.10.2009	09.10.2009			
43098	bg			8,00	LL+ES	09.10.2009	09.10.2009			
Implem...				8,00	LL+ES	09.10.2009	09.10.2009			
LL	Ele...	9,00		24,00	LL, L...	09.10.2009	13.10.2009	17.07.2009	27.07.2009	
43098	bg			15,00	LL+ES	12.10.2009	13.10.2009	17.07.2009	17.07.2009	
Implem...				15,00	LL+ES	12.10.2009	13.10.2009	17.07.2009	17.07.2009	
43103	c	9,00		9,00	LL	09.10.2009	12.10.2009	27.07.2009	27.07.2009	
LL+ES	LL...	29,38	7,38		LL+ES					
43098	bg	29,38	7,38		LL+ES					
Implem...		29,38	7,38		LL+ES					

Management Needed Column and Row Indicator

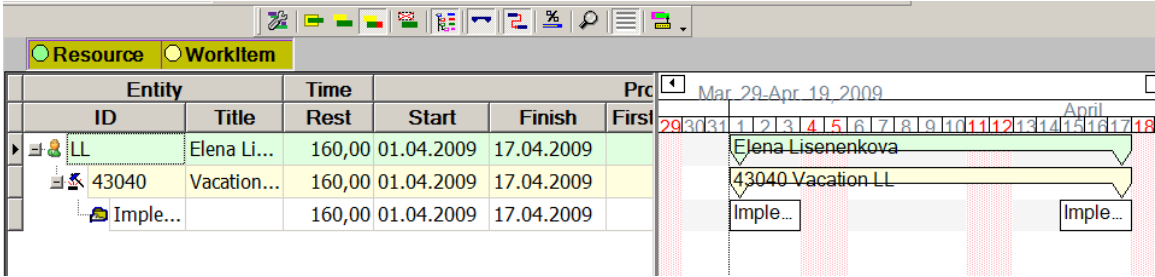
Resource Project WorkItem										
Entity		Time			Properties					
ID	Title	Rest	Pla...	Un...	ManagementNeeded	Pr...	Start	Finish		
\		36,0	36,0		Yes		11.12.2009	17.12.2009		
LL	Elena ...		36,0		Yes		11.12.2009	17.12.2009		
43162	DDDv		20,0		Yes	4	15.12.2009	17.12.2009		
43262	DD		16,0		Yes	2	11.12.2009	14.12.2009		
Management Needed is set. Double-click here to call advanced dialog Found problems: Total Time is out of Budget Finish exceeds LateFinish										
OE	Oleg E...				Yes					

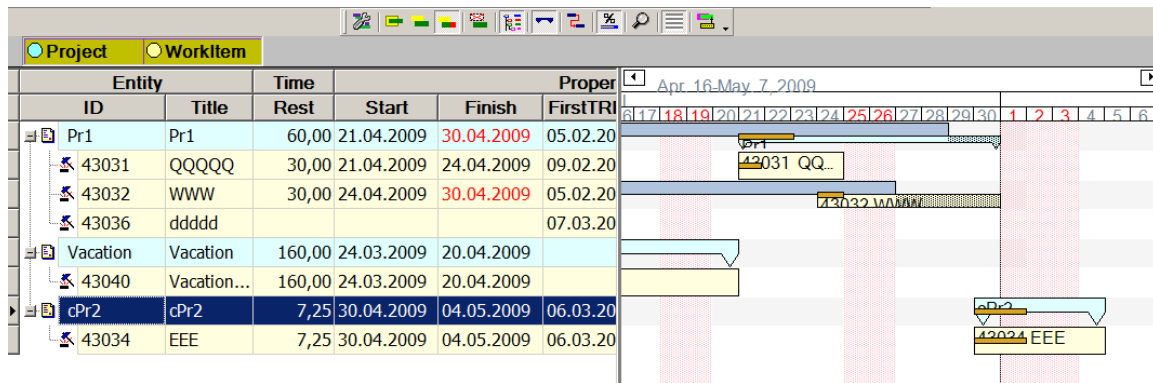
“ManagementNeeded” column is boolean (Yes/No) column, but its value is calculated based on various ManagementNeeded issues (or Warnings). One of them, for example, is “UnPlanned Hours remain”. You can choose in your Local Options that ManagementNeeded state will be marked in Row Indicator by yellow or red color. When you double-click on Row Indicator area, you will see a dialog describing ManagementNeeded issues for this Row (Node):



Gantt Pane

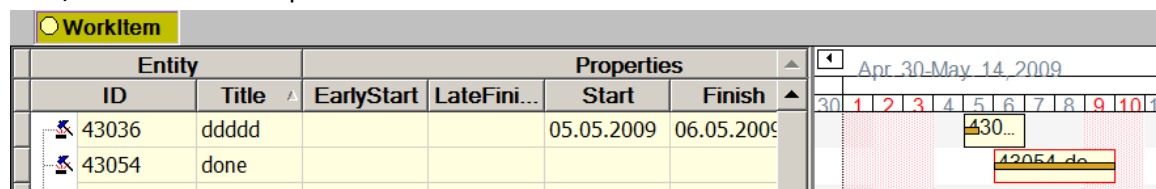
The Gantt Pane visualizes the results of Planning.





It has 3 types of time bars:

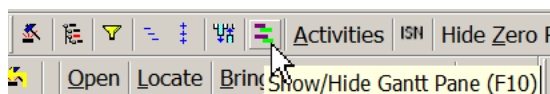
1. "EarlyStart-LateFinish" bar shows EarlyStart-LateFinish values for a node (Explorer columns "EarlyStart" and "LateFinish")
2. "Scheduled" bar shows either calculated by Planning algorithm Start and Finish values (Explorer columns "Start" and "Finish").
For WorkItems and Activities, which did not participate in Planning, this bar always shows actual start and finish of a task (Explorer columns "FirstTRDate" and "LastTRDate").
See here Gantt bar with red boundary for WorkItem 43054, pay attention that there are no Start/Finish values in Explorer columns.



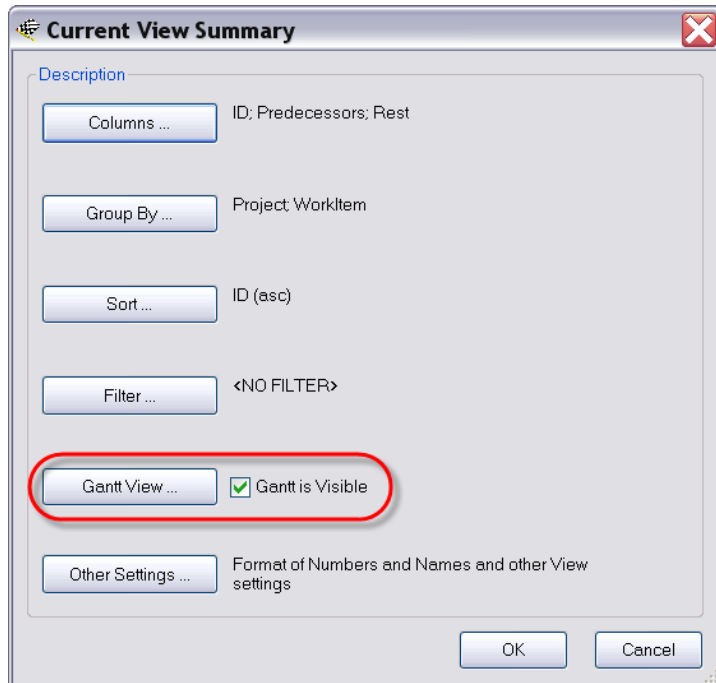
3. "Completion" bar visualize value of Explorer column "Completion".

How to Activate the Gantt Pane ?

To switch a Gantt Pane ON use Toolbar button or menu View -> Gantt Pane or F10.



Also you can select a View which has the Gantt Pane enabled, since the Gantt Pane options are stored together with the view:



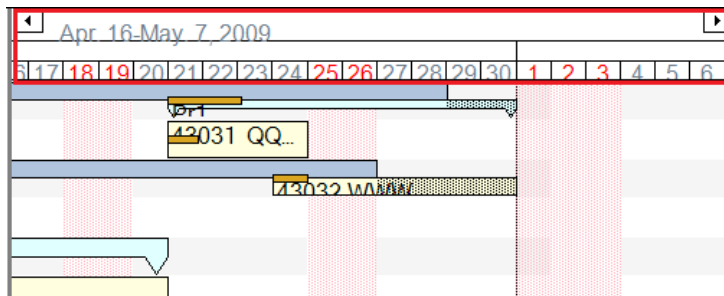
How to Zoom Gantt dates ?

On the picture see DateScaler Area marked red. Press left mouse button on the DateScaler Area and move mouse left (to zoom in) or right (to zoom out). It is in fact “dragging” in DateScaler Area.

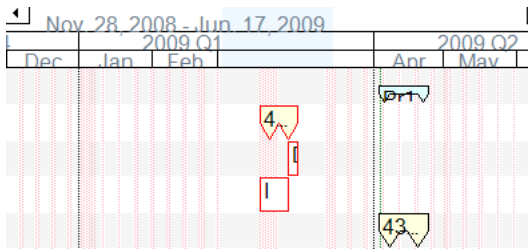
Note: there are 2 drag operations in the DateScaler: Zoom (Re-scale) and Scroll (move).

You can choose which operation is performed with pressed Ctrl key in the Gantt Options dialog on the page “Date Scaler”: **“Drag operation in Date Scaler with pressed Ctrl key”**

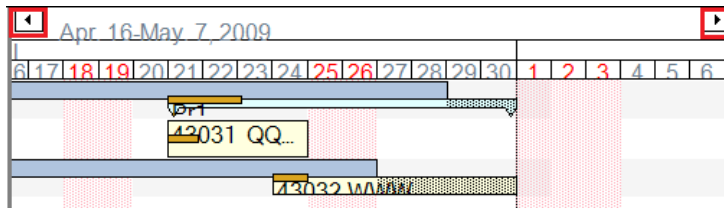
See also “Start Time” and “Stop Time” controls in [Gantt Options dialog](#), Tab “Misc”.



You can temporary zoom-in a part of Gantt to view small details. To do this, use the tool “Magnifying Glass” (“Use Magnifying Glass” button )



How to Scroll Gantt dates ?



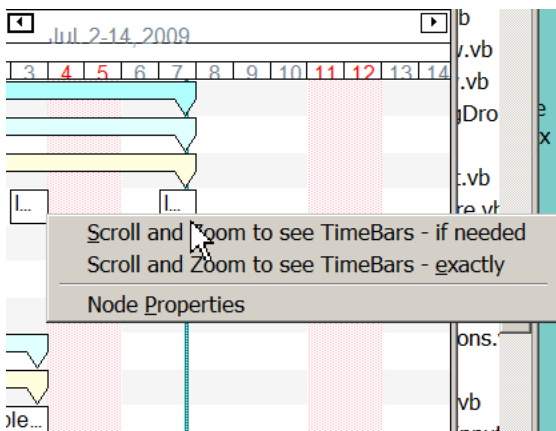
Use scroll buttons (marked red on the picture) or execute “dragging” in DateScaler Area with pressed Ctrl key.

Note: there are 2 drag operations in the DateScaler: Zoom (Re-scale) and Scroll (move).

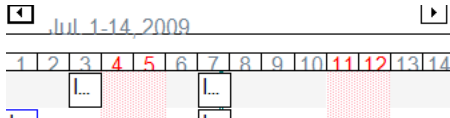
You can choose which operation is performed with pressed Ctrl key in the Gantt Options dialog on the page “Date Scaler”: **“Drag operation in Date Scaler with pressed Ctrl key”**

See also “Start Time” and “Stop Time” controls in [Gantt Options dialog](#), Tab “Misc”.

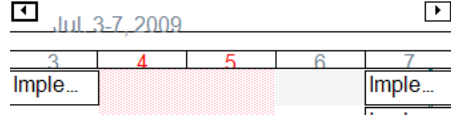
Popup Menu



Scroll and Zoom “if needed”: won't do any changes with Date Scaler if all TimeBars for a node are visible:



Scroll and Zoom "exactly": will scroll and zoom Date Scaler so that all TimeBars for a node are visible and time period is minimal:



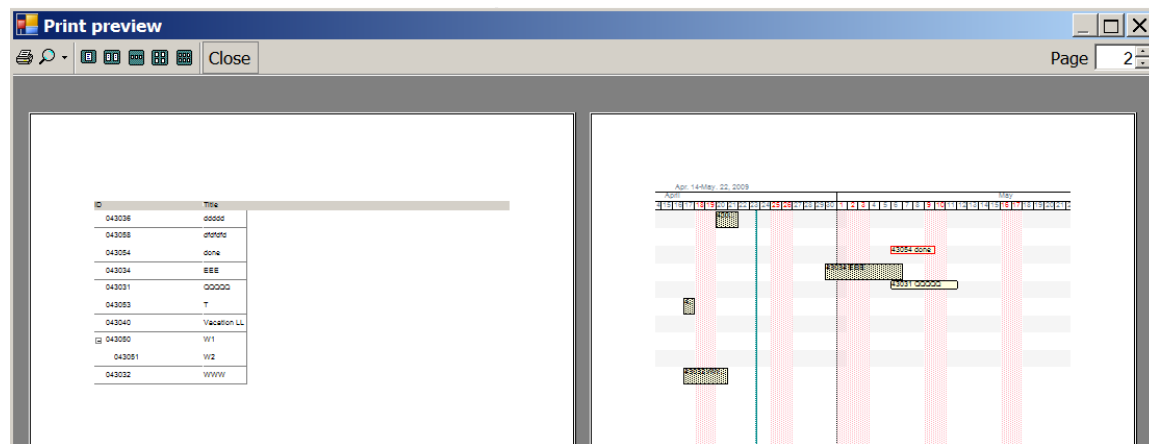
Node Properties: calls a Property dialog of an appropriate type for a current node. The same is performed by double-click.

How to Print Gantt?

Printing of the Gantt Pane is not implemented to the desired extent.

To print Gantt use menu File -> Print Gantt.

Now it consists of 2 pages:



Gantt Pane Options

Gantt Pane is customized by means of Gantt Toolbar and Gantt Options dialog.



"Customize Gantt Pane" button, calls Gantt Options dialog. See the pictures (2 Tabs) of this dialog below.

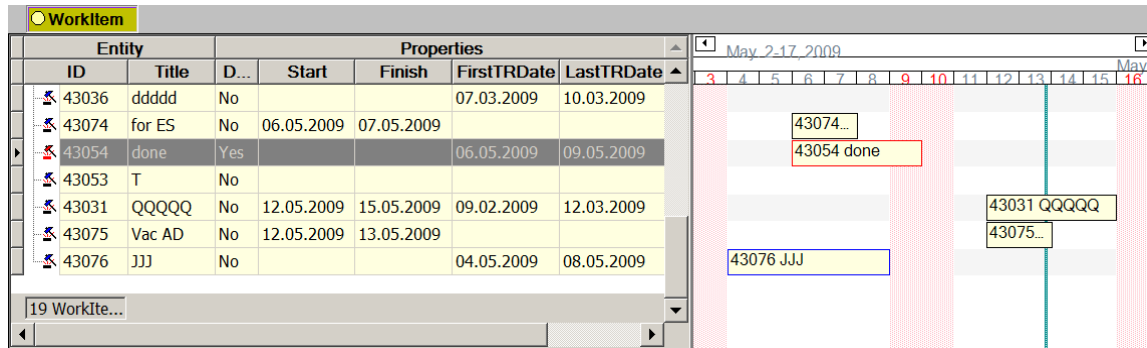


When Option is On, only scheduled items are shown in Gantt Pane, i.e. those that participate in Planning (are estimated, included in ResourceAllocation View, etc).

When Option is OFF, all items of Explorer have their representation in Gantt Pane, except those that have no TimeReports (columns FirstTRdate and LastTRdate are empty).

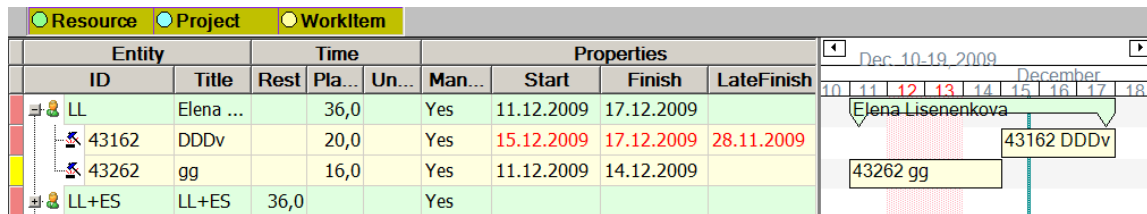
Not-scheduled items have **red** (for done) or **blue** (for not done) boundary. Start and Finish of Gantt Bar for non-scheduled item is defined by First TimeReport date and Last TimeReport date.

Here option "Show Gantt Bars only for scheduled items" is OFF, WorkItems 43076 and 43054 are not scheduled:

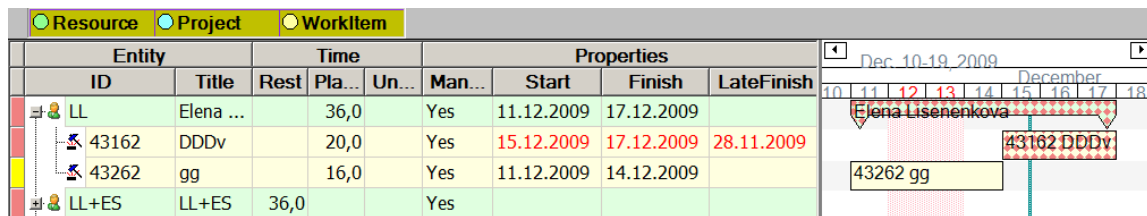


These 2 buttons work as radio-group. These values regulate problem visualization in the Gantt. They behave the same as values in "Problem Visualization" in [Gantt Options](#) dialog, Tab "Colors and Series Layout".

Here you can see the Gantt Pane when both buttons are unchecked:



"Gantt Pane: Visualize Management Needed Issues" button



The style in which Management Needed Issues are marked can be chosen in the Gantt Options dialog:

Management Needed Style

☐ Solid
 ☐ Shadow
 ☒ Hatch

Hatch Style: SolidDiamond

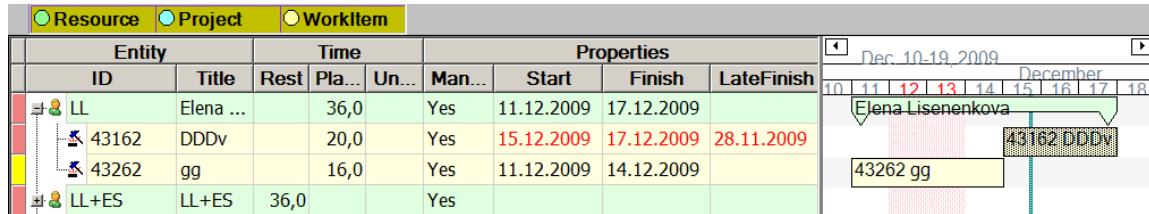


"Gantt Pane: Visualize Conflicts with Latest Finish" button

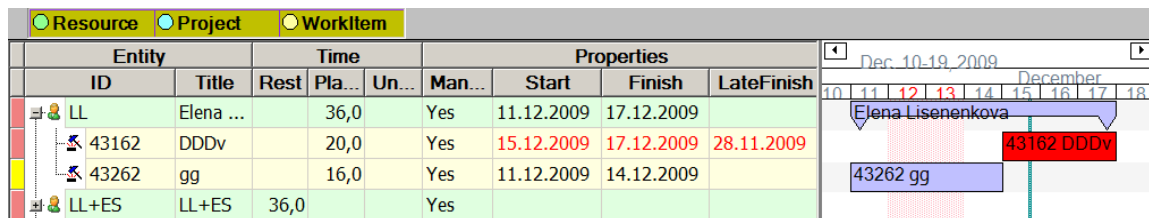
Conflict area is the part of Scheduled bar that lays outside of EarlyStart-LateFinish bar boundaries.

Conflict area is marked either by different color or by hatch style. Pay attention that “Conflict” is also marked in Explorer: values in columns “Finish” and “LateFinish” are red.

Conflict area when “Use Explorer Colors” is ON (see button ):



Conflict area when “Use Explorer Colors” is OFF, the color of the Conflict area is defined in Gantt Options dialog, Tab “Colors and Series Layout”:

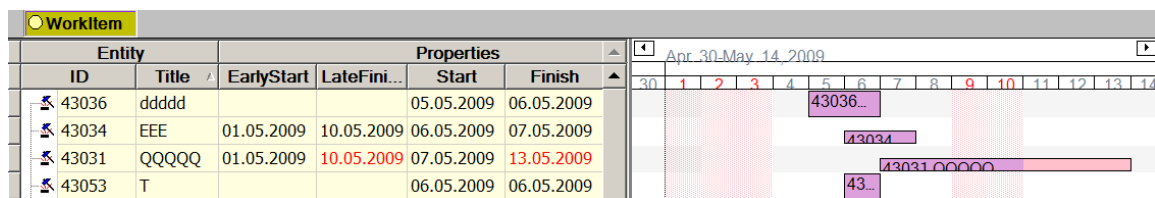
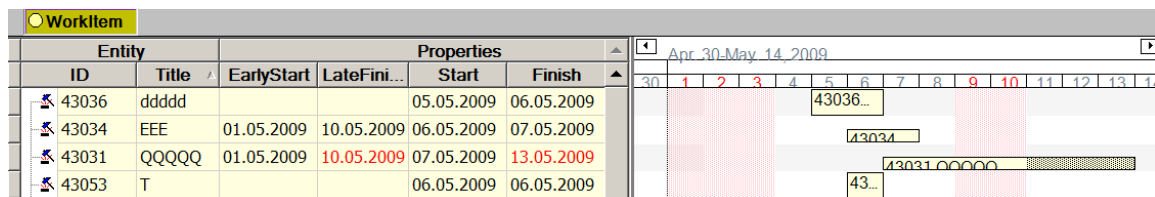


 “Show EarlyStart-LateFinish **Time bars**” button

Compare with above two pictures, where EarlyStart-LateFinish bars are visible. Here EarlyStart-LateFinish bars are hidden.

It behaves the same as “Show EarlyStart-LateFinish Time Bars” in Gantt Options dialog, Tab “Colors and Series Layout”.

The color of EarlyStart-LateFinish bars is regulated by “EarlyStart-LateFinish Time Series” color ibid.



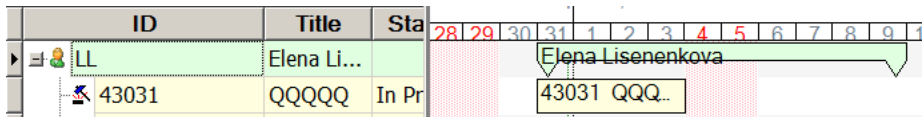
 “Use Explorer Colors” button.

Colors for drawing Gantt time bars are customizable.

This option regulates Scheduled bars color.

If “Use Explorer Colors” is ON, the color of Scheduled bars is derived from the color of appropriate node

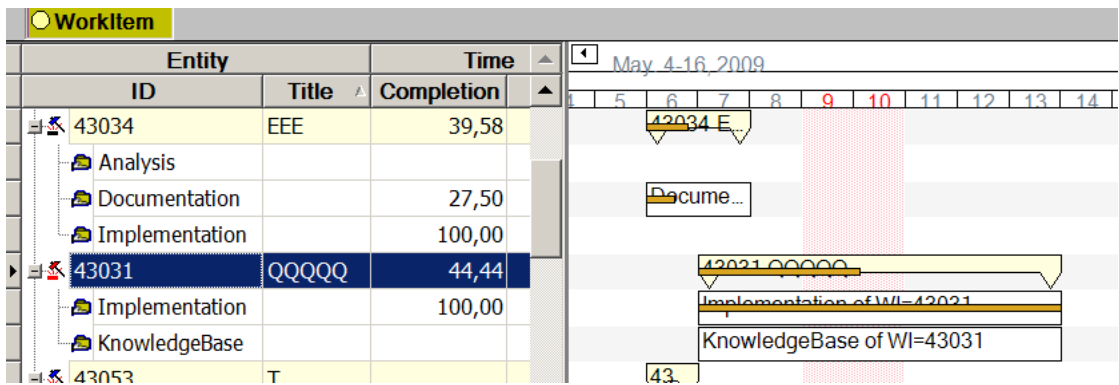
in the Explorer. See here “sandy” color for WorkItems, “green” for Resources:



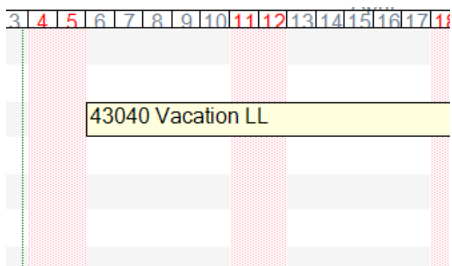
If “Use Explorer Colors” is OFF, the color of Scheduled bars is defined in Gantt Options dialog, Tab “Colors and Series Layout”

“Show Completion” button

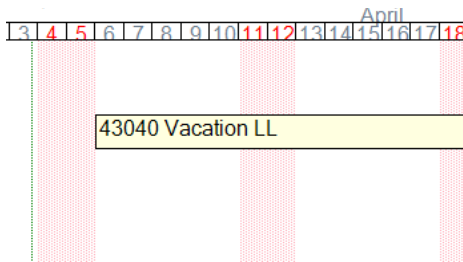
See Completion bars (narrow, in gold color). Compare with Completion column of Explorer. It is the same as “Draw Completion Series” in Gantt Options dialog, Tab “Colors and Series Layout”. The color is regulated by “Completion Color” ibid.



“Draw Pyjamas” button

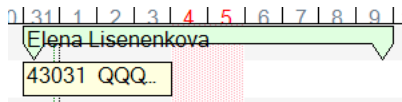


“Draw Pyjamas” is ON. See background stripes.

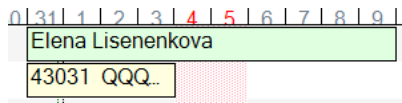


“Draw Pyjamas” is OFF

“Bracketed Style for Grouping Nodes” button



“Bracketed Style” is ON.



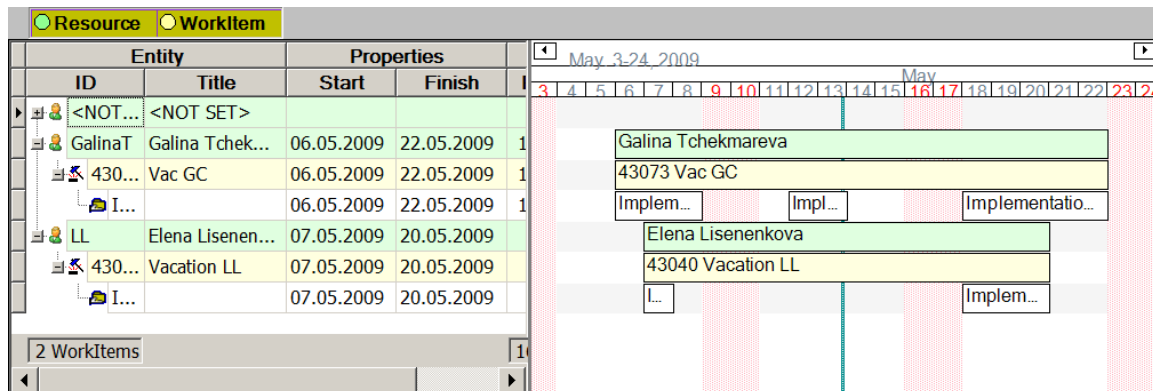
“Bracketed Style” is OFF.

“Show Structured Intervals for Grouping Nodes” button

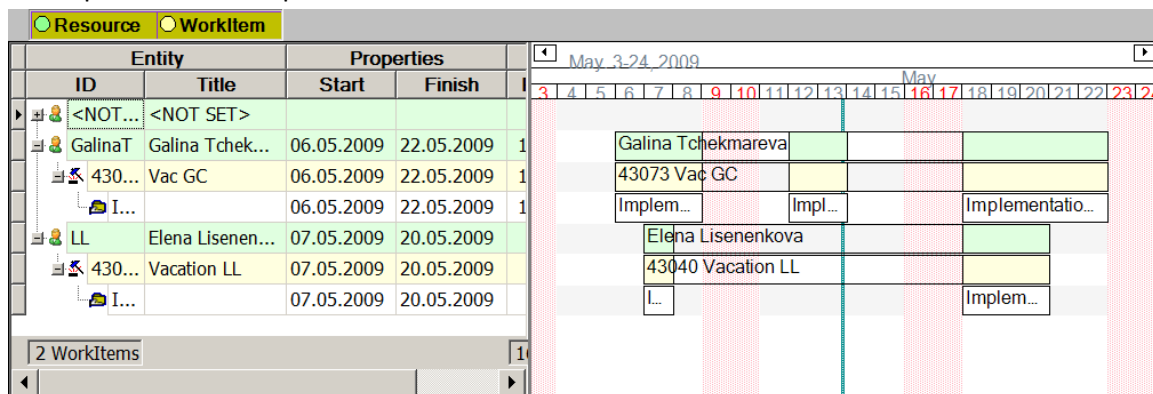
There can be situations when ResourceAllocation contains several records for a single WorkItem. For example, vacation can consist of 2 or 3 periods:

Properties							
Priority ^	WBS	Start	End	MaxLoad	MaxHours	Reserve	E...
1	[43073] Vac GC (LL\Vacation)	06.05.2009	09.05.2009			☐	☒
2	[43073] Vac GC (LL\Vacation)	12.05.2009	13.05.2009			☐	☒
3	[43073] Vac GC (LL\Vacation)	18.05.2009	22.05.2009			☒	☒

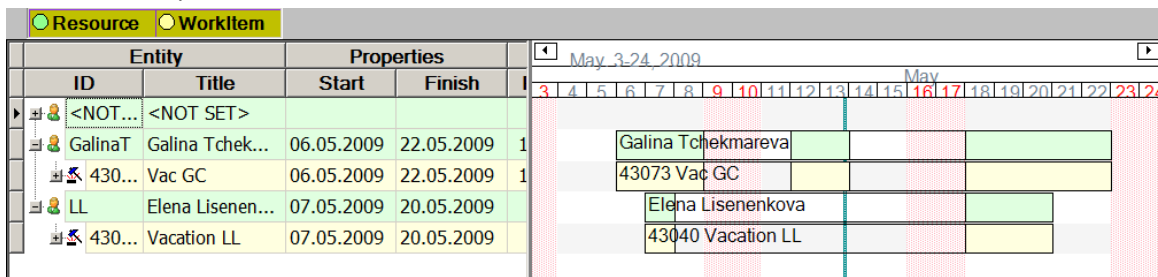
When “**Show Structured Intervals for Grouping Nodes**” is OFF, grouping nodes (such as WorkItems or Resources on this picture) have Gantt Bars that show whole period:



When “**Show Structured Intervals for Grouping Nodes**” is ON, Gantt Bar for grouping node shows the whole period as a transparent and colored structure:

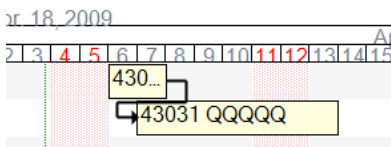


Same but collapsed:



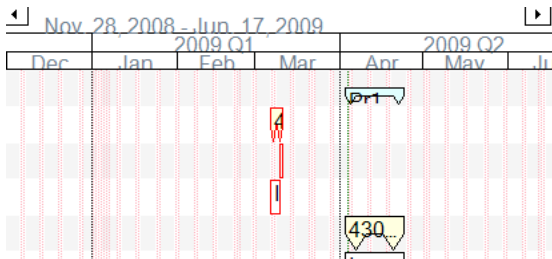
See also paragraph “Gantt View samples” Vacation View.

 “*Draw Predecessor Links*” button

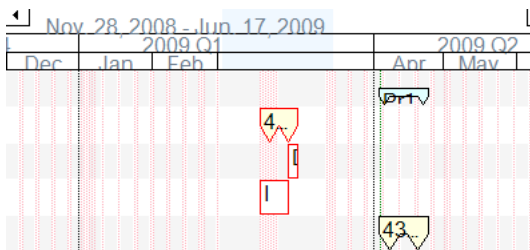


“Draw Predecessor Links” is ON.

 “*Use Magnifying Glass*” button



“Magnifying Glass” is OFF.

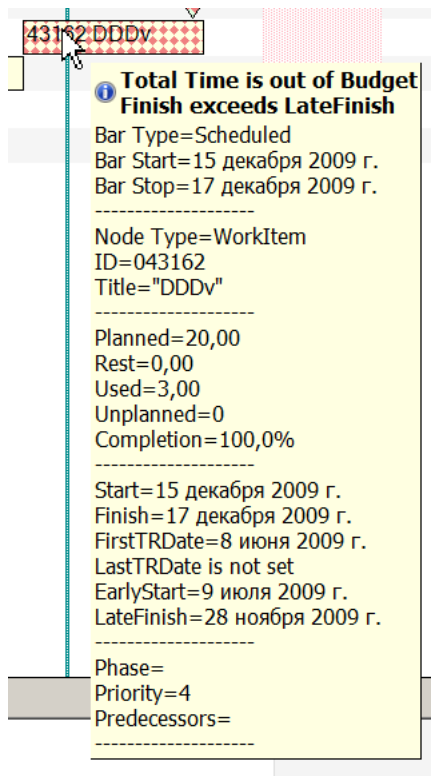


“Magnifying Glass” is ON. Middle columns are wide.

 “*Show TimeItem Hints*” button

Hints (or tooltips) for Gantt bar are rather long, so you can switch them on/off.

A hint for a WorkItem looks like this:



Gantt Options Dialog

Gantt Options dialog has three Tabs. Most of the options in the dialog have their analogs in Gantt toolbar. See their descriptions above.

Un-described options in the Tab “**Misc**”:

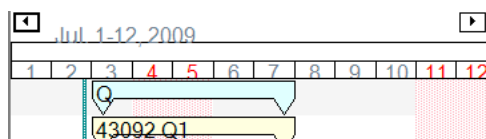
Allow change TimeItem Limits: for future use, not used now.

Un-described options in the Tab “**Date Scaler**”:

Upper and Lower Bounds (Time Band Limits):

“Time Band Limits” defines Upper and Lower Bounds of the time axis. You cannot scroll Gantt view out of these Bounds. Upper and Lower Bounds can be either “Absolute Dates” or “Calculated on WorkItems in Explorer”. In the second case Upper and Lower Bounds will be recalculated for each Explorer refreshing.

Start Date and End Date on the Date Scaler (Visible Period Limits):



On this picture Start Date is the 1 of July, End Date is the 12 of July.

Start and End Dates can be either “Absolute” or “Relative”. In the second case they are calculated by formulas: Start Date = Today – Days Back, End Date = Today + Days Forward.

Start and End Dates cannot be outside of Time Band Limits, if so, they are adjusted.

Drag operation in Date Scaler with pressed Ctrl key:

There are 2 drag operations in the DateScaler: Zoom (Re-scale) and Scroll (move).

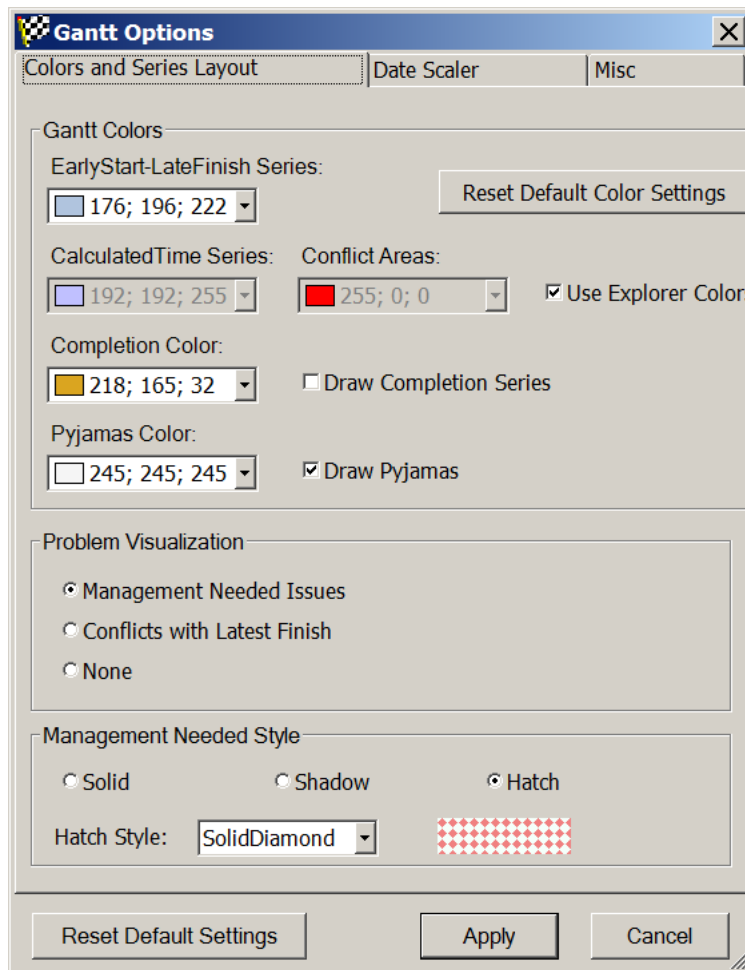


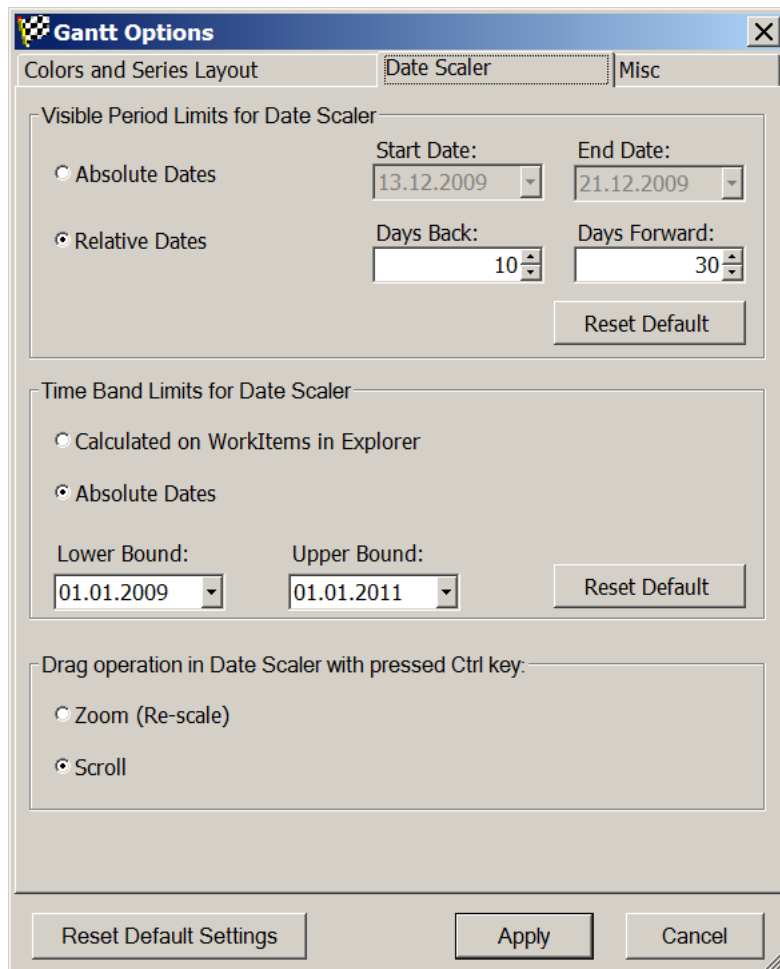
Scroll result:
 The scroll result shows the timeline shifted to the left. The main view now covers July 3 to 13, and the zoomed-in section covers July 4 to 12.

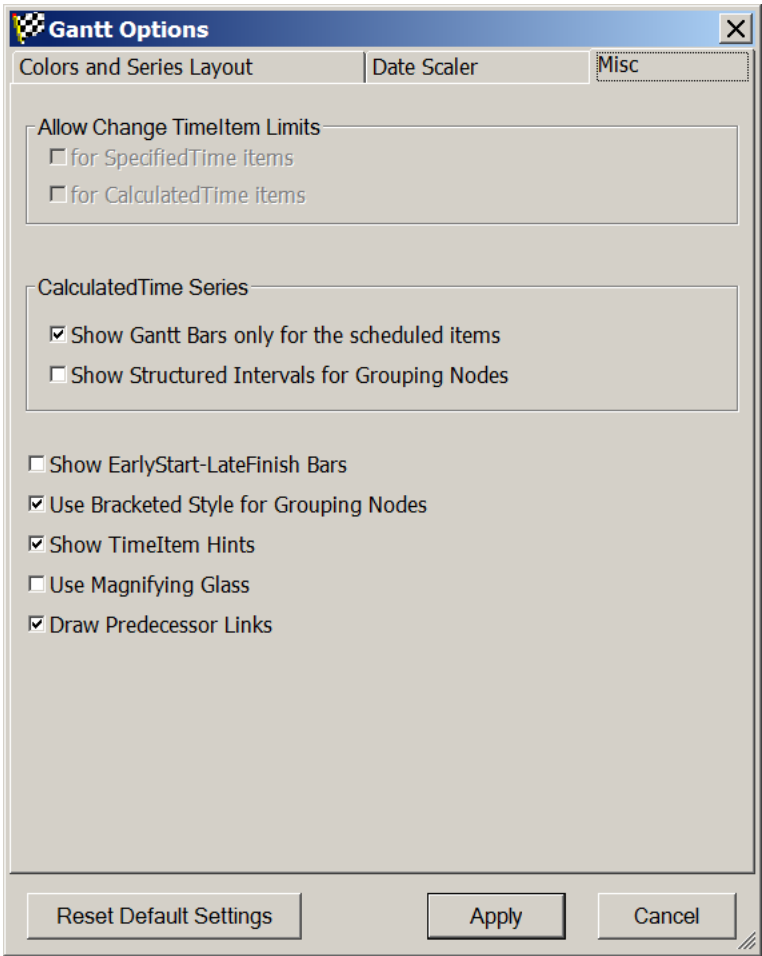
Zoom result:
 The zoom result shows the timeline zoomed in. The main view now covers July 3 to 13, and the zoomed-in section covers July 4 to 12.

You can choose which operation is performed with pressed Ctrl key.

Here you can see pages of Gantt Options dialog:



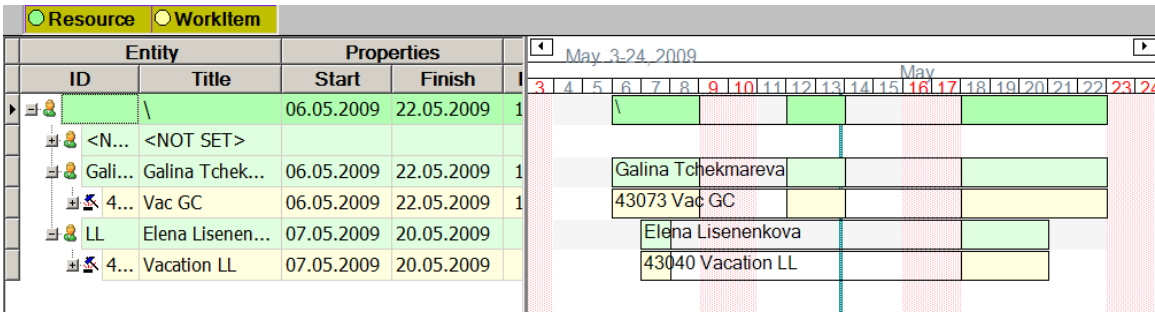




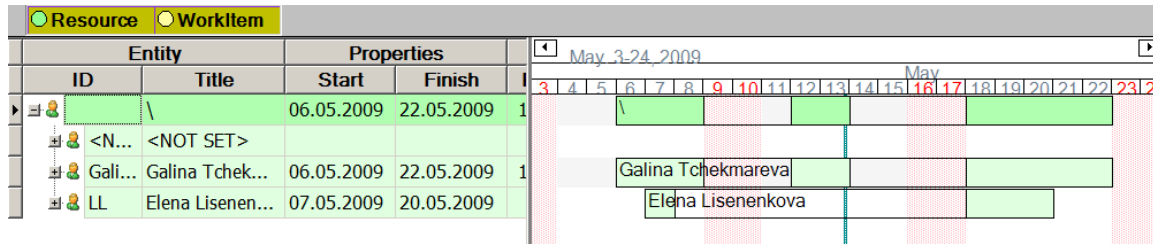
Gantt View Samples

Vacations View:

Use  "Show Structured Intervals for Grouping Nodes" Gantt option.



or collapsed to Resources level:



View Options: group by Resources and WorkItems, Activities is ON, Collapse to WorkItems or Resources level

GanttOptions used:

Problems: not shown

Show EarlyStart-LateFinish Time is OFF

Use ExplorerColors is ON

Show Structured Intervals for Grouping Nodes is ON

Bracketed Style is OFF

How to Spot Planning Problems?

WorkItem (Activity) node has no bar in Gantt Pane.

First of all check values in “Start” and “Finish” columns in Explorer. If they are not empty, you should simply scroll TimeBar of the Gantt Pane, so that dates from these columns fall into current time period. If they are empty, check reasons from the list below.

Reasons, why values in “Start” and “Finish” columns in Explorer for a node are empty and therefore this node has no Gantt bar:

1. Menu item Actions->Planning was not called.
2. F2 (“Apply Selection” button) was not called (if “Auto Refresh” is OFF).
3. WorkItem (Activity) was not estimated (Rest is not set)
4. Resource is not assigned to WorkItem (Activity).
5. WorkItem is not included into any of WBS nodes in Resource Allocation Pane.
6. WorkItem is not scheduled due to some more prioritized tasks have all Resource time. See values in the “UnPlanned” and “Planned” columns in Explorer.

Start/End dates in Gantt bar are not what you expect.

WorkItem (Activity) may be scheduled only partially. See value in the “UnPlanned” and “Planned” columns in Explorer.

Permissions and Roles

Permissions system of Agile-Team is developed to fulfill the following main objectives:

- Ensure system integrity by means of providing controlled access to critical system data only for authorized persons;
- Provide administrators and managers with easy-to-use tools for controlling access to Projects, Phases, Parts and other Dimensions;
- Provide all users exactly with information they need, limiting access to other information in order to safeguard information from unauthorized access by mistake or intentional evil.

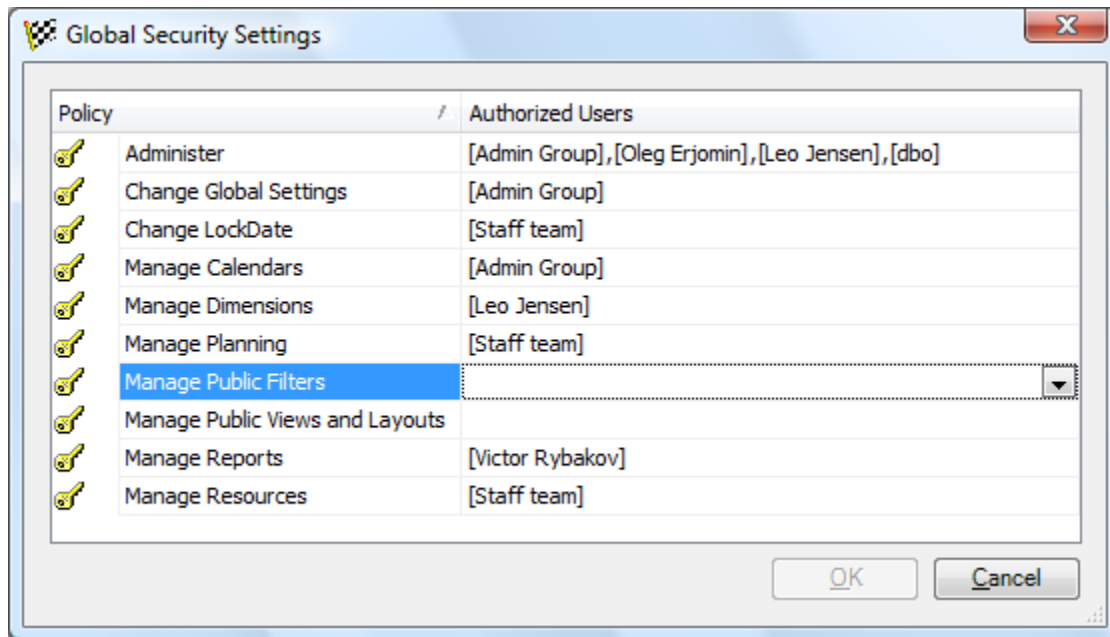
Permissions system of Agile-Team defines permissions of the following **two** groups:

1. Permissions for Global Operations that ensure the system integrity.
2. Permissions for access data in various Dimensions.

Permissions for Global Operations

Permissions for Global Operations govern the strict access to critical data. Damaging of this data can break the system integrity.

In order to manage Permissions for Global Operations choose menu command: Tools/Global Permissions Settings. Only persons who had rights to **Administer** are allowed to execute this command. If you have such rights, Agile-Team will show the following dialog window:



Using this dialog you can manage Global Permissions. But keep in mind, that you cannot designate any Global Permission to yourself. Ask another authorized person to do it for you.

Agile-Team defines the following set of Global Permissions:

Administer

Administrators are super users in Agile-Team. They have full

power for all Global Operations, listed below. Also, administrators have rights to see full trees of all Dimensions, and to change [permissions for access to all Dimensions](#). Administrators have rights to create new Agile-Team logins.

Change Global Settings

Allows changing Agile-Team [Global Settings](#).

Change LockDate

Allows changing of [Lock Date for TimeReporting](#). When **Lock Date for TimeReporting** is set, then it is not possible to add/delete any Time Reports, or do any changes to existing Time Reports before this **Lock Date**

Manage Calendars

Allows [Calendars](#) management. Calendars form the basis for TimeReporting.

Manage Dimensions

Permits to create, to delete custom [Dimensions](#), and/or change its Properties.

Manage Planning

Permits to execute the Scheduler and hereby update the plans for all projects.

Manage Public Filters

Allows creating, modifying and/or deleting of any public [Filters](#).

Manage Public Views and Layouts

Allows to create, to modify and/or to delete any public [View](#) and [WorkItem dialog/pane Layouts](#)

Manage Reports

Allows to organize [Reports](#) and set permissions on Reports

Manage Resources

Permits all operations on [Resource](#) management including, creating, modifying and deleting Resources and Groups, setting Groups members etc. Note that Resource managers do not have rights to create new Agile-Team logins. They can use only existing ones.

Notice for SQL Server Administrators.

Three of Agile-Team Global Permissions require special rights at SQL Server. Agile-Team and SQL Server security roles mapping is handled by Agile-Team. But if, for some reason, specific SQL Server rights were denied for Agile-Team roles listed in the table below, you can experience some errors. In this case you need to check proper SQL Servers security settings, and restore required ones.

Agile-Team Permission	SQL Server Security Roles
Administer	Server Role: <code>securityadmin</code> Database Role: <code>db_owner</code>
Manage Resource	Database Roles: <code>db_accessadmin</code> , <code>db_securityadmin</code> Special Rights: <code>ALTER ANY LOGIN WITH GRANT OPTION</code>
Manage Dimensions	Database Role: <code>DimAdmin</code> This role is granted to create and alter any tables

Permissions for Dimensions Access

Agile-Team Dimension trees resemble File System of popular Operating Systems like Windows or Linux. Indeed, you can think about Projects as about Folders, and about WorkItems as about Files.

No wonder, that Agile-Team supports the Permissions system for Dimension Access that is quite similar to the file system.

Effective Permission is the combination of “**Allow**” and “**Deny**” flags.

$$EP = \text{“Allow” AND NOT “Deny”}$$

If “**Allow**” or “**Deny**” flag is not set explicitly for some node, it is assumed as inherited from node’s parent, up to the Root of the tree.

Common Permissions for Dimension Access

Common Permissions for Dimension Access include: **Read, Edit, Delete, Create SubItems, and Change Permissions.**

Read	Allows or denies reading of all properties of the selected Item. If the item represents a container, i.e. Project, Group, etc, then this permission allows to list child items in this container. This permission is granted to Administrators on the ROOT nodes of all Dimensions by default.
Edit	Allows or denies item data modification. When denied, the item is assumed as “Read-Only”.
Delete	Allows or denies deletion of the item.
Create SubItems	Allows or denies creating SubItems of the selected Item. This permission doesn’t allow creating WorkItems within a Project. Special permission is required for this purpose.
Change Permissions	Allows or denies changing permissions of the item. This permission is granted to Administrators on the ROOT nodes of all Dimensions by default.

Special Permissions for WorkItems

Unlike other Dimensions in Agile-Team, WBS Dimension supports four additional Permissions for WorkItems.

Create	Allows or denies creation of WorkItems within selected Project.
Edit	Allows or denies WorkItem data modification. When denied, all WorkItems within selected Project are assumed as “Read-Only”.
Delete	Allows or denies deletion of WorkItems within selected Project.

Report Time

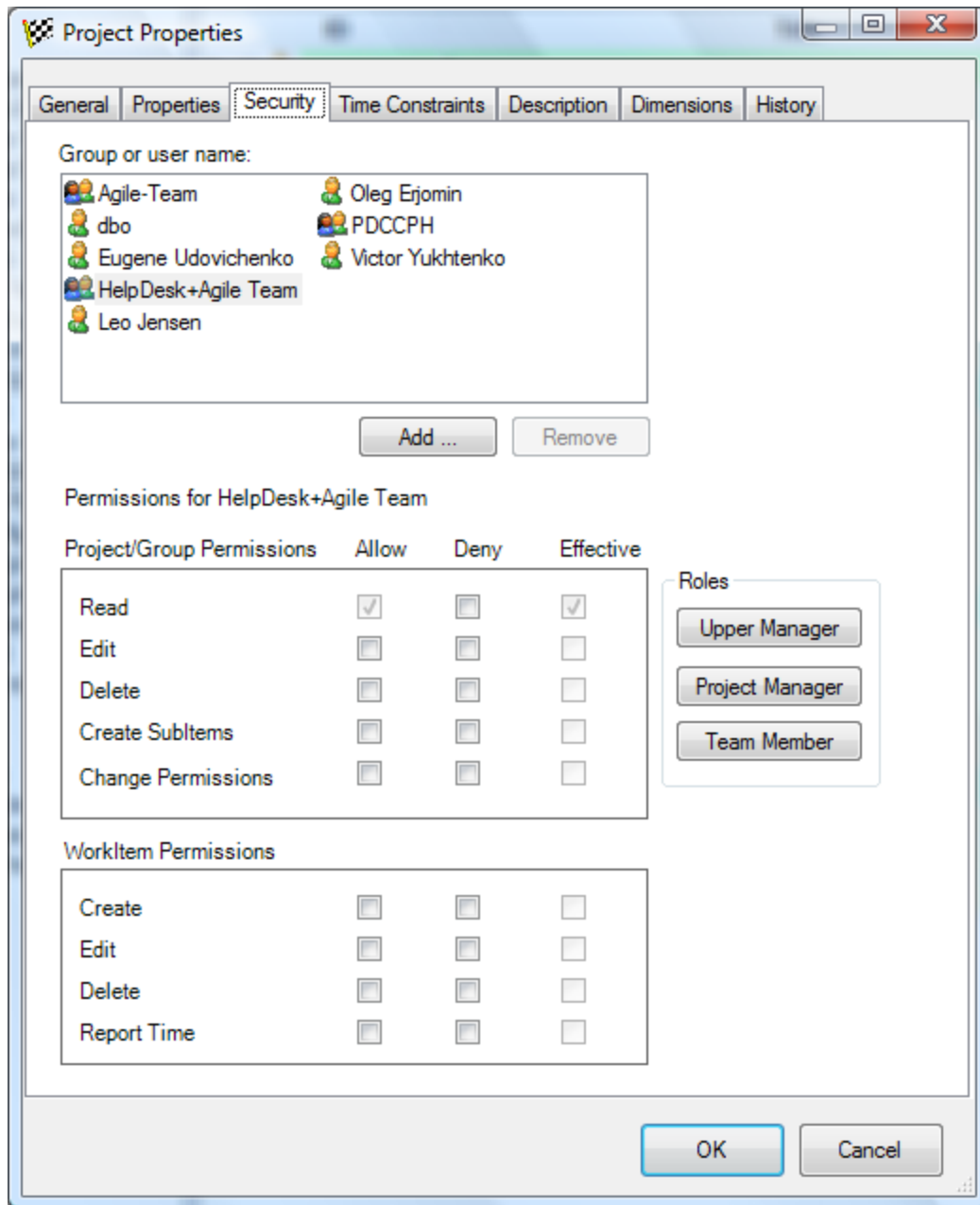
Allows or Denies to Report Time on WorkItem Activities within selected Project. Only Resources that this Permission is granted to will appear in the Resource trees of WorkItem dialog where it is possible to assign Resource for Activity.

How to View or Edit Permissions for Dimension Item

In order to inspect and manage Permission of any Dimension Item you should use this Item's Property dialog. This dialog can be invoked:

- Using menu command **File/Properties**;
- Using context menu **Properties**;
- By double-click at the Item;
- Selecting the Item and pressing **Enter** key.

Each Dimension Item Property dialog have the Permissions tab that allows managing Permissions for selected Item. This tab is similar for all Dimensions of predefined and user-defined. The exception is WBS Dimension only, because in addition to common permissions it has a set of special Permissions for WorkItems.



The **Permissions** tab page contains a list of Resources or Groups that have some permission granted on selected Item and a Control Panel for editing the Permission.

You can **Add** or **Remove** any Resource form the List. When Resource is removed from this list, then all permissions on selected item are revoked from this Resource.

Permissions for selected Resource are displayed in the Control Panel. For each of Permission the Control Panel has three checkboxes: **Allow**, **Deny** and **Effective**.

Remember that Effective Permission is the combination of “**Allow**” and “**Deny**” flags.

EP = "Allow" AND NOT "Deny"

Effective checkbox is always disabled, because it only shows the result of Effective permission calculation.

If **Allow** or **Deny** checkboxes are disabled this means that its values are inherited from the parent.

Deny flag takes precedence over Allow flag. Therefore if Deny flag is set to ON for parent Item, it cannot be overridden in child Item by Allow flag.

Roles

There are **three** Roles defined in Agile-Team for easier designation of access permissions on WBS Items.

Upper Manager	Usually Upper Manager needs only to review project. So, only Read permission is granted to this person.
Project Manager	Project Managers need full rights on their projects. So, the full set of permissions is granted to Project Managers: Read, Edit, Delete, Create SubItems, Change Permissions, Create WorkItems, Edit WorkItems, Delete WorkItems, and Report Time.
Team Member	Team Members are allowed to Read Project properties and list all child WBS Items, and have full rights for access to WorkItems. Permissions granted to Team Members include: Read, Create WorkItems, Edit WorkItems, Delete WorkItems, and Report Time.

In order to assign the Role to the selected Resource, just click at the corresponded button at Permissions tab of [Project Property Dialog](#).

Search and Filtering

Agile-Team offers various tools of search and information selection. These tools include:

Selector	Allows setting constraints according to which WorkItems are selected. These constraints are intersection of all Dimensions.
Search Tool	Full text search tool, that provides searching for WorkItems by all textual fields.
Filter	Filters are used to specify more advanced filtering conditions than the Selector offers. Filters and the Selector form the final conditions for selecting WorkItems.
WorkItem Browser Tool	A simple tool to pick out and manipulate WorkItems.

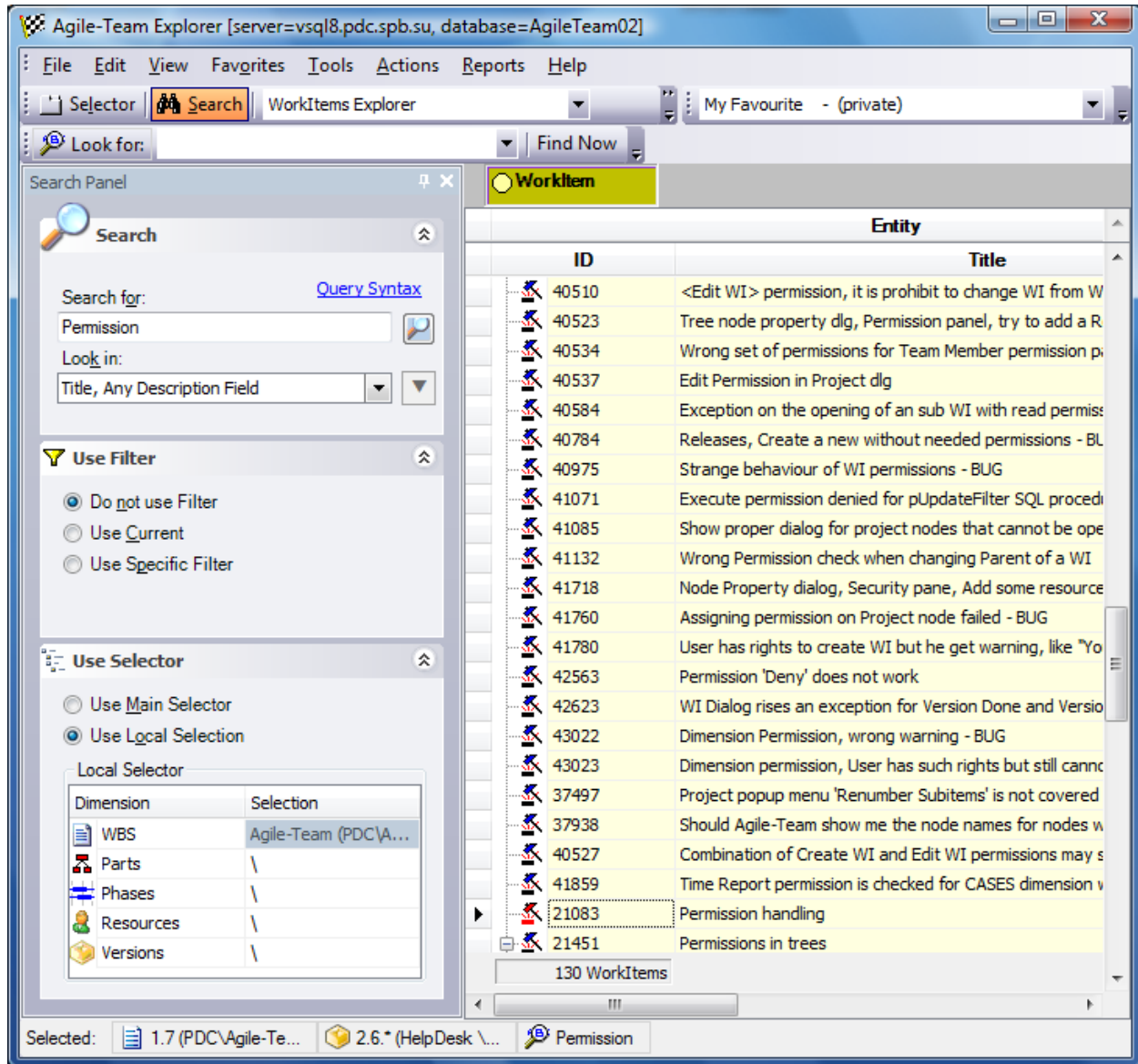
Search for WorkItems

The Search tool in Agile-Team allows selecting WorkItems through the full-text search on the contents of such fields as Title or Description.

The **Search Tool** is invoked by:

- pressing the Search button at the **Main** toolbar;
- using the **View/Selector Pane/Search** menu command (**Ctrl+F**).

When the **Search Tool** is activated it replaces the **Selector**, and vice versa.



The **Search Panel** contains **three** child panels:

Search

Here you define:

- your search terms by entering the string to be looked for;
- the fields to be included in search;
- the search type. Search Type can be one of:

- Find any word combination with wildcards;
- Find exact word and phrases;
- Find all words and word forms;

The second and third options use the SQL Server Full Text Engine. They work fast in contrast with the first option. But these options are not available under SQL Server 2005 Express Edition.

The query string can contain logical operations: **AND, OR, AND NOT, NEAR.**

Use Filter It is possible optionally to apply a Filter to the Search result. In this panel you can choose between using the current filter or selecting another one.

Use Selector Agile-Team performs search operation on the WorkItem set determined by the Selector. You can choose between using either the Main or Local Selector. Local Selector is a copy of the Main Selector, but it applies only for search task.

Alongside with the Search Panel Agile-Team offers the Quick Search Bar.



This Bar is available regardless of whether the Selector or the Search Panel is activated. To find WorkItems that contain some words or phrases quickly, simply type them in this Bar and press **Enter** or the **Find Now** button. Agile-Team Search Engine will use the same settings as in the Search Panel.

We recommend using the Full Text Search for all words and word forms in most cases, if this feature is available.

Using Filters

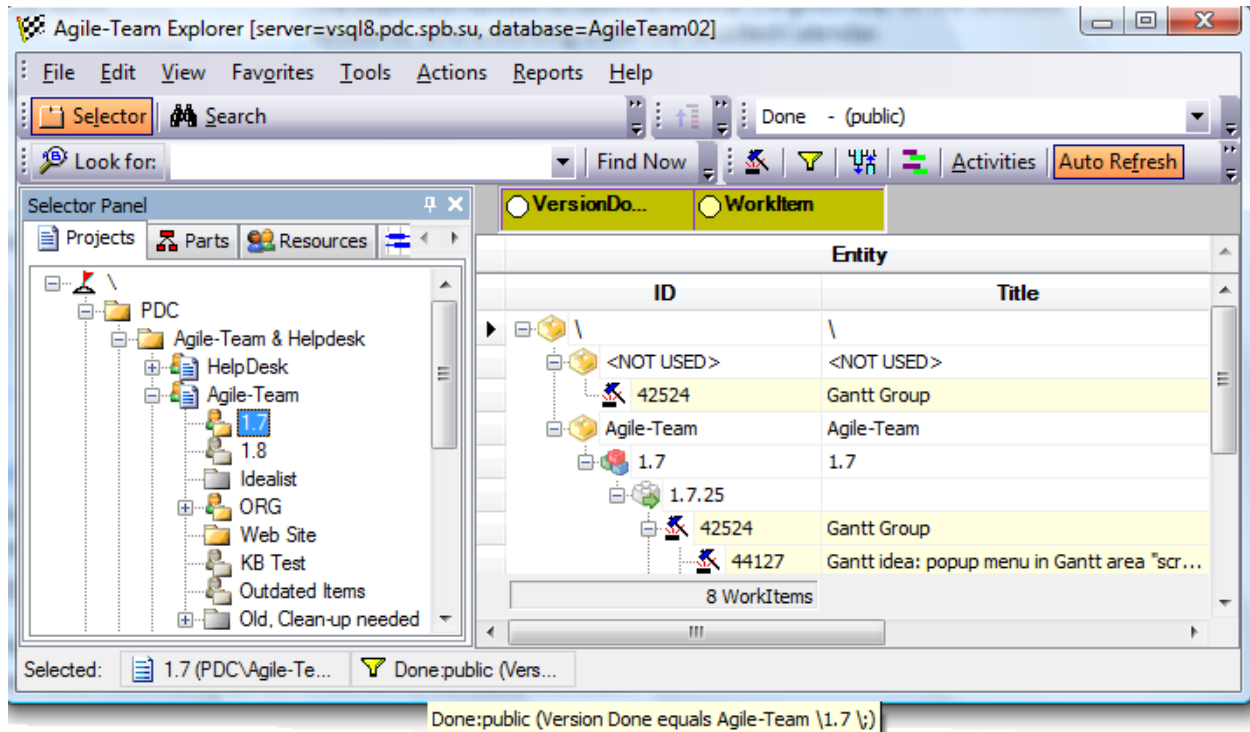
The filter mechanism in Agile-Team is an advanced tool that being used separately or in conjunction with the Selector form the conditions for exact selecting WorkItems.

Agile-Team supports both Public and Private filters. Public Filters are available for all users, but Private filters are defined by each user for his own needs. In order to be able to modify the Public Filter, a user must have a special [Permission](#). Users can exchange filters by means of the [Organize Filters tool](#) if these filters seem to be useful.

Filters can be applied by means of:

- The **View/Filters/Filters** menu command (F3);
- The  toolbar button ;

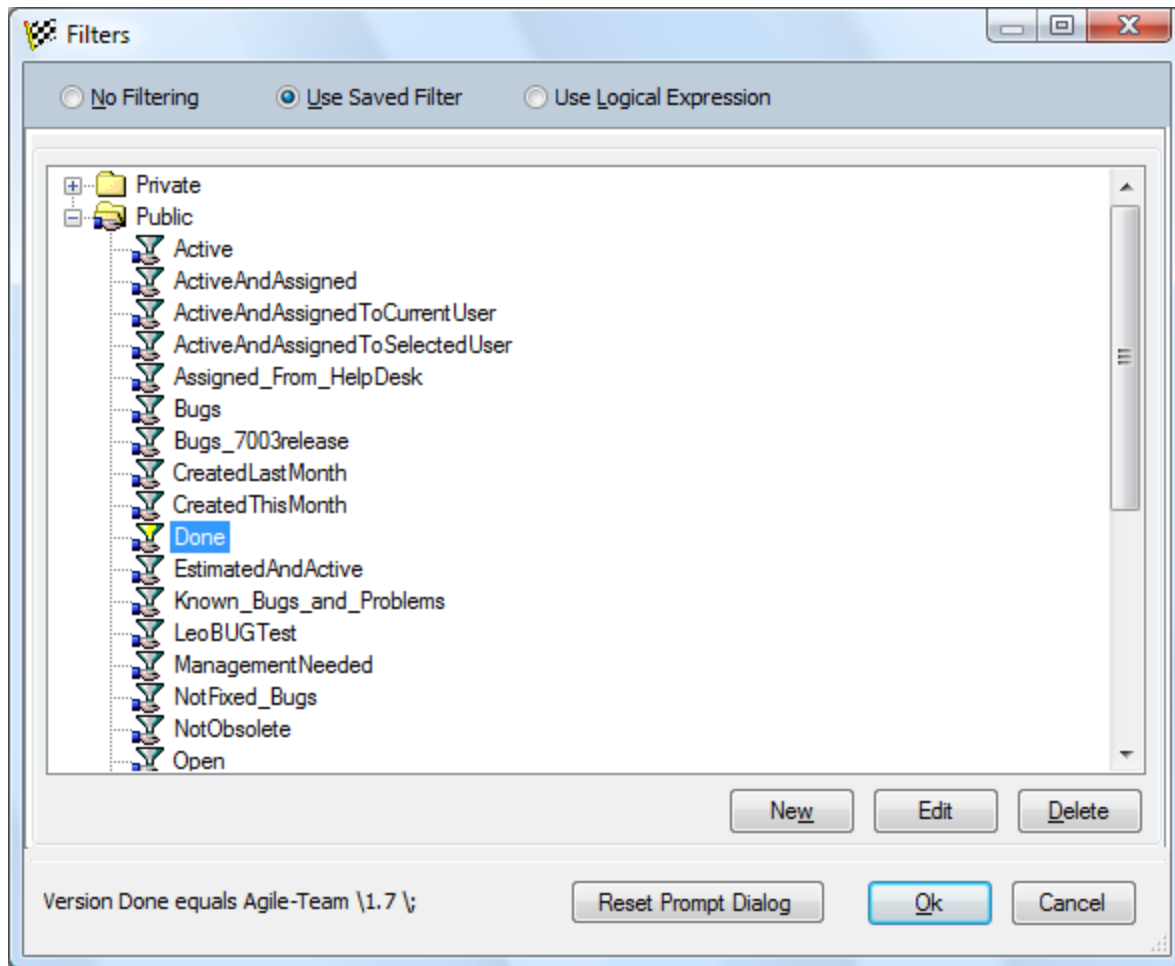
Once applied, the current filter is displayed in the Status Line.



When you call filtering, the Filters Dialog shown below appears at the screen. This dialog allows you to choose either:

- not to use filtering;
- use one of previously constructed and **saved filters**;
- define a new filter by means of a **logical expression**.

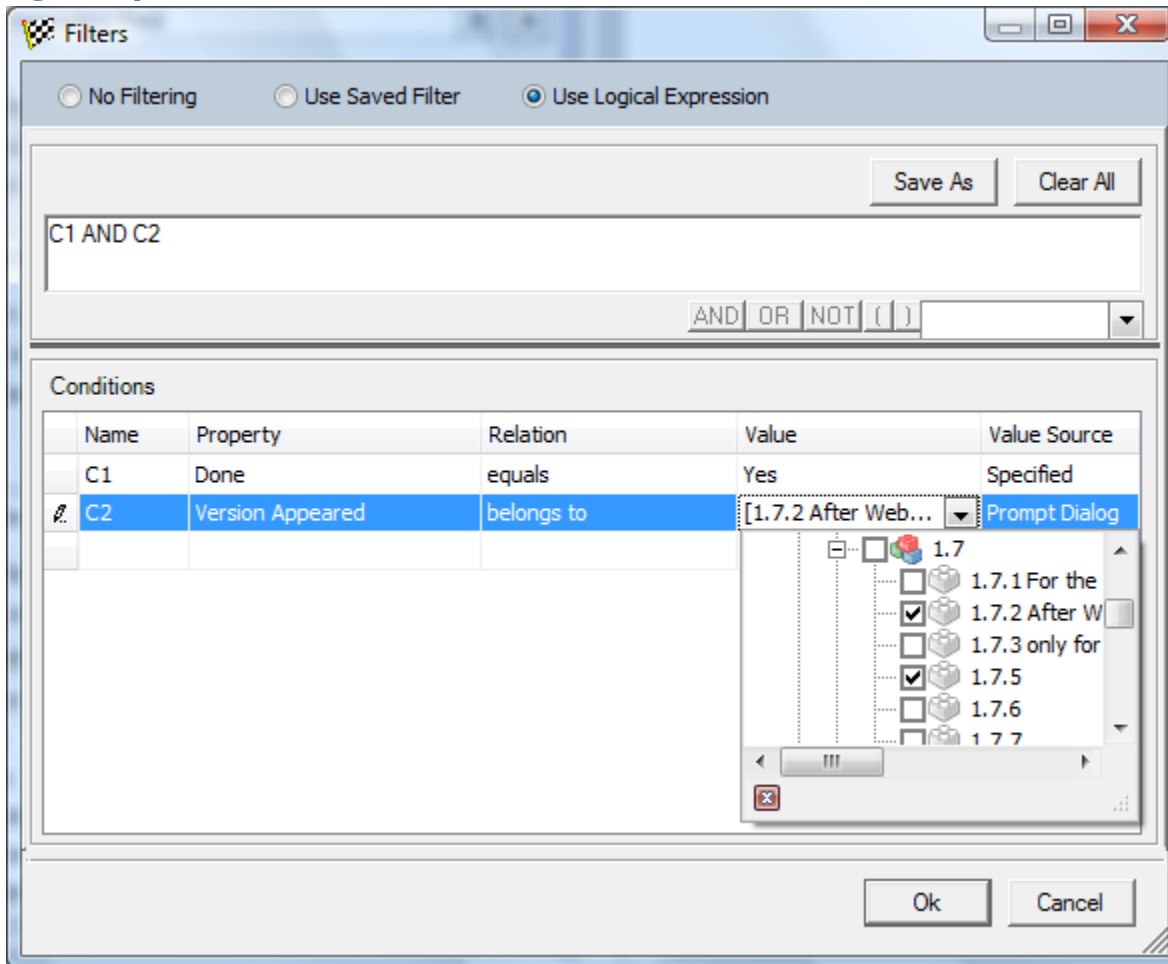
This choice is performed by the buttons at the top of the window.



When you choose to use **Saved Filter**, this dialog will show the tree of two levels that contains all public and your private filters. In order to apply a filter, just select it from the tree.

If a selected filter has interactive parameters, then such parameters will be shown at the bottom of the dialog, and you will have an option to reset these parameters with the **Reset Prompt Dialog** button.

The **Use Logical Expression** option is useful, when you want to define a new Filter or to use some temporary Filter. In this case the working area of the dialog is occupied by [Logical Expression Editor](#). This Editor is also used for design of persist Filters.

Logical Expression Editor

Filters are Logical Expressions built on Conditions. The logical expression can contain **AND**, **OR**, **NOT** logical operations. Brackets can be used to set precedence. In addition to referring to conditions, Logical Expressions can also refer to other saved Filters.

Conditions are generally constructed by referring to a **Property**, a **Relation**, and some **Values**. Relations are to be evaluated when a Filter is applied.

Logical Expression Editor consists of text box where you can edit the Expression and Condition sheet.

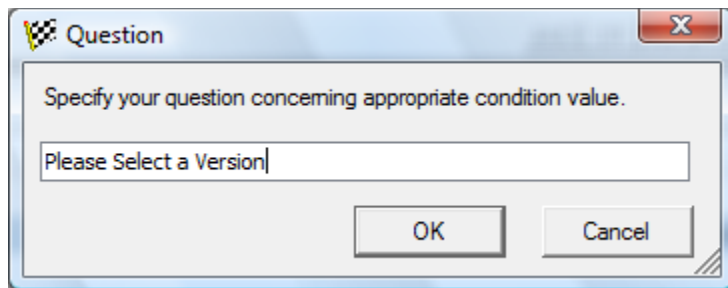
You can type the expression yourself, but Agile-Team can help you to build simple expressions also. By default, each new condition will have name **CN** and is included in Expression as next AND condition.

Five buttons below text box serve as shortcuts for logical operations and braces. If you want add reference to existing Filter, you can choose it from the list below text box.

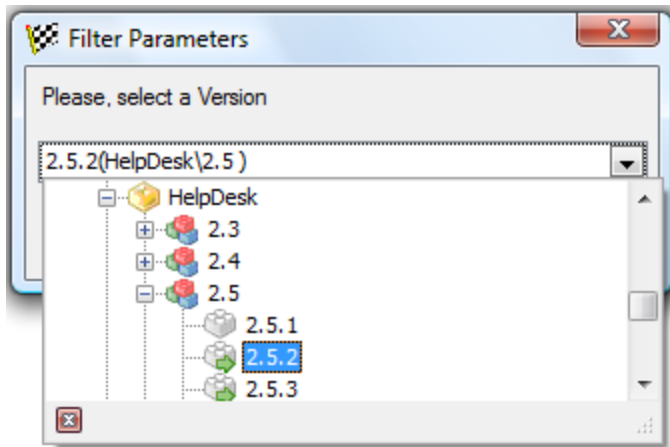
Condition sheet contains all conditions that can be used in current Logical Expression. There are five columns in this sheet:

Name	Name of Condition. Agile-Team generates the sequential names like C1,C2,...,CN by default. You can give more descriptive name like “Active”, “AssignedToMe”, etc.
Property	In this column you need to select one of the entities to filter on. Most of the properties directly correspond to the Project Properties and Explorer columns, but there are some specific. Full list of properties is described below.
Relation	Relations depend on Property data types. Common relations are “equal”, “not equal”. The table below describes all possible properties and corresponding relations.
Value	This column contains an in-place editor for entering the value of the property. The type of the editor depends on property data type. It can be text box, list box, integer spin editor, drop-down tree, etc.
Value Source	In this column you can specify how the value for the relation should be obtained. There are three possible choices: • Specified. The value is explicitly specified in the Value column. It is the default option. • Prompt Dialog. The Prompt Dialog asking for a value appears when the Filter is applied. The value, specified in Value column will be default value in the Prompt Dialog. • WI Selector. This option is available for the properties, which have corresponding Dimensions. When Filter is applied the value is obtained from the Selector.

If Value Source is set to Prompt Dialog, then it is possible to specify the question to be given, when the Filter is applied.



When filter with one of such property is to be applied, Agile-Team brings a dialog for obtaining a value.



Once the Filter Parameter is entered, it will be remembered so that don't annoy user with permanent questions on each WorkItem Explorer refresh. In order to reset the Filter values, you need to call the Filter dialog and press the **Reset Prompt Dialog** button.

The table below summarizes all Filter properties.

Property	Relations	Description
Active State	equals not equals to belongs to	WorkItem Active State: Active, Inactive, Closed
Activity Done	equals belongs to	Choose Activities with Done State = Yes
Activity State	equals not equals to belongs to	Active state of the Activities. Can be Active or Inactive
AKind	equals not equals to belongs to	Activity Kind. Can be one of the following: Analysis, Implementation, Testing, Documentation, Knowledge Base, Review
Created By	equals not equals to belongs to	Resource who created the WorkItem
Creation Date	today on on or before on or after between yesterday in the last 7 days last week this week last month this month	Date of creation of the WorkItem
Dimension ...	equals not equals to belongs to	These properties are generated for each of user-defined Dimensions. Property means the Dimension Item referred from the WorkItem
Done	Equals	Done State of the WorkItem. Can be Yes/No .
Done Date	today on	Date when WorkItem was Done

Property	Relations	Description
	on or before on or after between yesterday in the last 7 days last week this week last month this month	
Error Severity	equals not equals to belongs to	Error Severity can be one of: Normal, Unlikely Critical, Critical
External ID	contains doesn't contain is(exact) is not is empty is not empty	Optional string value, that can be used for interfacing with another systems
FirstTRDate	today on on or before on or after between yesterday in the last 7 days last week this week last month this month	The first Time Report date of the WorkItem
LastTRDate	today on on or before on or after between yesterday in the last 7 days last week this week last month this month	The latest Time Report date of the WorkItem
Made Available for TimeReporting	equals not equals to include belongs to	Resources, who are able to do TimeReporting via " Brought In Activity " mechanism.
Management Needed	equals not equals to belongs to	The reason for what the management is needed. Can be one of: Analyzed, Entered, Estimate is changed, Pending.
Manager	equals not equals to include belongs to	Resource that is a Manager for the WorkItem.
Obsolete	Equals	Indicates whether the WorkItem is marked Obsolete (Yes/No value).
Originator	equals not equals to belongs to	Originator of the WorkItem

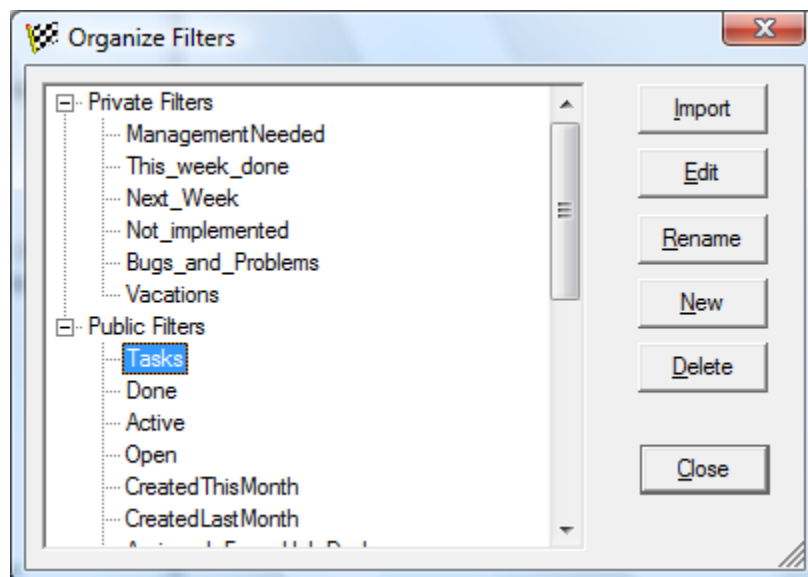
Property	Relations	Description
Part Node	equals not equals to belongs to	Part assigned to the WorkItem.
Phase Node	equals not equals to belongs to	Phase which the WorkItem belongs to.
Planned	Equals	WorkItem is included in plan. Yes/No value.
Planned Finish Date	today on on or before on or after between yesterday in the last 7 days last week this week last month this month	Calculated by Planning system finish date of the WorkItem.
Planned Start Date	today on on or before on or after between yesterday in the last 7 days last week this week last month this month	Scheduled start date for WorkItem, as a result of planning algorithm.
Platform	equals not equals to belongs to	Platform Property of the WorkItem.
Priority	equals not equal to more than at least less than at most between	WorkItem Priority from 1 to 9.
Project Node	equals not equals to belongs to	Project, which contains a WorkItem.
Publish	Equals	Yes/No value that indicates that WorkItem is ready to be published at the Knowledge Base and Product Release Notes.
Resource	equals not equals to include belongs to	Resources who are Assigned to Activities in WorkItem, or who have TimeReports on those Activities.
Resource Assigned	equals not equals to include belongs to	Resources who are Assigned to Activities in WorkItem.
Resource Planned	equals not equals to	Resources who planned to carry out the WorkItem.

Property	Relations	Description
	include belongs to	
Resource Reported	equals not equals to belongs to	Resources who have TimeReports on the Activities in WorkItem.
Rest Time	equals not equal to more than at least less than at most between	The sum of currently estimated remained times for all Activities of the WorkItem.
Time Period Columns	equals not equal to more than at least less than at most between	The sum of Time Reports on all Time Period Columns , that are defined in WorkItem Explorer.
Time Report Date	today on on or before on or after between yesterday in the last 7 days last week this week last month this month	Date of any TimeReport made on WorkItem's Activity.
Total Time	Equals not equal to more than at least less than at most between	Total Time for WorkItem as sum of Rest and Used: <i>Total = Rest + Used</i>
Used Time	equals not equal to more than at least less than at most between	Sum of all Time Reports for all Activities of the WorkItem.
Version Appeared	equals not equal to belongs to more than at least less than at most between	For Bugs type WorkItems this column displays the Version where the Bug has appeared.
Version Done	equals not equal to belongs to more than	Version where the WorkItem is implemented. The Relation "knownbugs" for the VersionDone property, can be used to filter out Bugs and Issues that are relevant for a given

Property	Relations	Description
	at least less than at most between knownbug	version.
WorkItem Description	contains doesn't contain is(exact) is not is empty is not empty	Any of WorkItem Description.
WorkItem Kind	equals not equals to belongs to	WorkItem Kind. Kinds of WorkItem are: Bug, Task, Issue, Question, and Note
WorkItem State	equals not equals to belongs to	Status of the WorkItem. It can be one of the follow: Entered, InAnalysis, Analyzed, InProgress, InReview, Pending, Obsolete, Closed, Done, Inactive.
WorkItem Title	contains doesn't contain is(exact) is not is empty is not empty	WorkItem Title.
Ad hoc filter	Equals	This field is intended only for advanced customers with a contract to develop custom queries. Ad hoc filter is a part of plain SQL query, that should be executed against the Data Source when the Filter is being applied.

How to Organize Filters

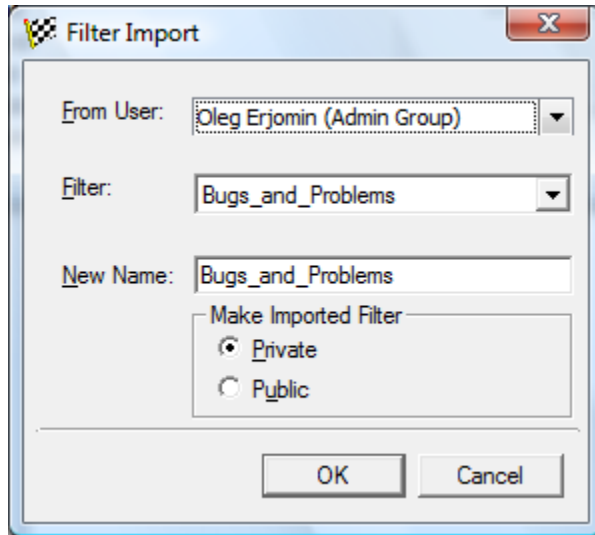
It is possible to organize Filters under the **View/Filters/Organize Filters** command:



Here it is possible to **Import** Filters from others users, to create a new Filter (with **New** button), to **Edit** an existing Filter, to **Rename** or to **Delete** Filters.

When you are creating a new Filter or editing an existing one, you use [Logical Expression Editor](#), described above in order to define the Filter logic.

Pressing the **Import** button, you will get the dialog that handles the import of Filters. Filter importing is a convenient tool for sharing useful filters among Users, or for creating specialized Private Filter on the basis of the Public.



From User Here you can select User whose filters you are going to import. If you choose <Everyone> in this field, then Public Filters will be shown in **Filter** listbox. If an actual Resource is selected, then his/her Private Filters will be shown there.

Filter This listbox displays a list of Public or Private Filters, depending on the choice made in **From User** field.

New Name Here you can enter a new name for imported Filter.

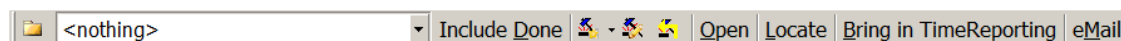
Make Imported Filter Here you can set whether the imported Filter will be Private or Public.

Notice, that in order to import Filter as Public you should have [Manage Public Filters](#) permission.

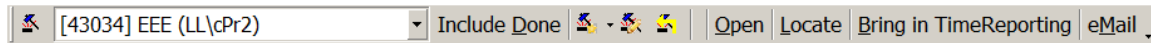
WorkItem Browser

WorkItem Browser is a set of tools to pick out and manipulate a WorkItem and is represented by a "WorkItem Browser" Bar.

On this picture no WorkItem is selected:



On this picture a WorkItem “EEE” with Id=43034 from “LL\cPr2” Project is selected:



The toolbar consists of 2 parts: tools that assist to choose a WorkItem and tools that operate chosen WorkItem.

Tools to choose a WorkItem.



There are **four** ways to choose a WorkItem:

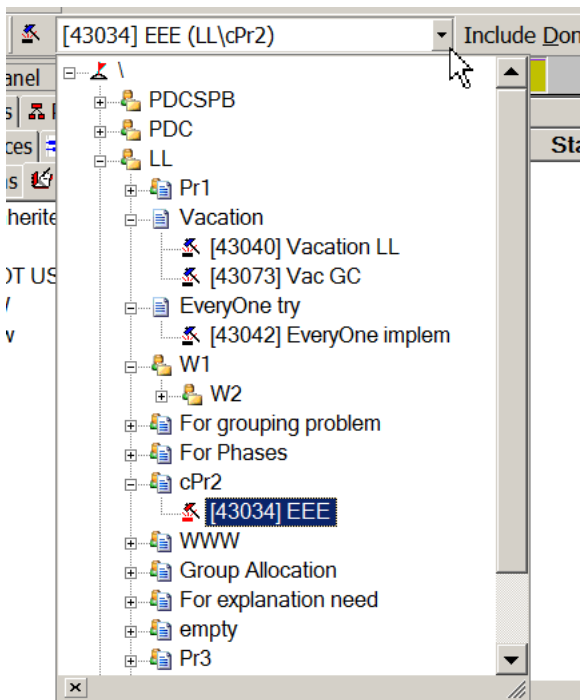
1. From the WorkItems tree
2. From “Recently Opened WorkItems” list
3. By WorkItem Id
4. Use WorkItem node selected in the Right Pane (Explorer or Daily/Monthly Vies)

How to Choose WorkItem from a drop-down WorkItems tree.

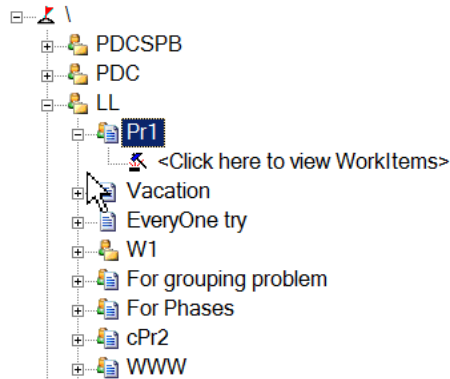


To view a drop-down Projects/WorkItems tree, click on arrow or use Ctrl/Enter when focus is in the control.

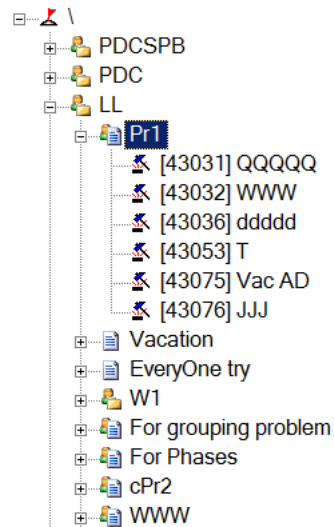
The current WorkItem is a selected node in this tree:



When you first open a drop-down Projects/WorkItems tree, you see only Project nodes, no WorkItems are included. Under each Project node there is a fictive node “<Click here to view WorkItems>”:



So click on it and it will change to a list of WorkItems under this Project. Select a WorkItem and double-click or press Enter key on it.

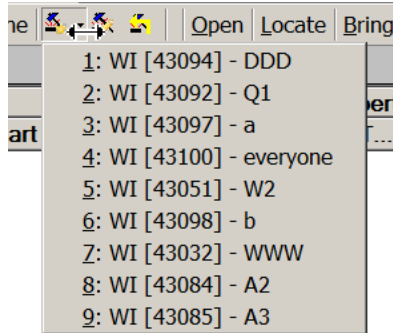


Include Done :

It is an option for Projects/WorkItems tree. “Done” WorkItems are included into tree only if this option is set.

How to Choose WorkItem from “Recently Opened WorkItems” list

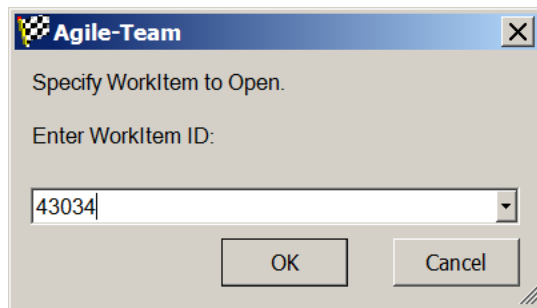
 button



Choose a WorkItem from the list by clicking on it or using Enter key.

How to Choose WorkItem by Id

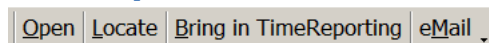
Press  button. In the following dialog just enter WorkItem ID manually or select it from the drop-down list of previously entered values.



How to Choose WorkItem from Right Pane

Press  button. The currently selected (or focused if multi-selection is ON) WorkItem node, if any, is chosen.

Tools to Operate a WorkItem.



Four commands can be executed for the chosen WorkItem:

- **“Open”** opens WorkItem properties dialog.
- **“Locate”** changes the Selector so that WorkItem becomes visible in the Explorer Pane.
- **“Bring in TimeReporting”** makes Activities of the WorkItem available for TimeReporting, i.e. chosen Activities will be added into Daily and Monthly Views.
- **“eMail”** creates a mail message containing the selected WorkItem as a reference to that can be used as a Favorite link.

Printing and Paper Reports

Agile-Team supports printing of WorkItem Explorer, any Dimension View, and Time Report Views. Several predefined Reports are provided also.

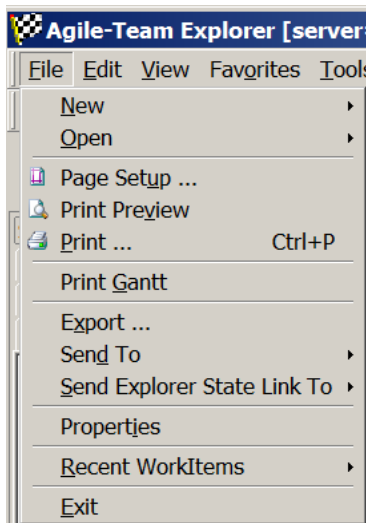
Printing System

Printing System consists of three standard operations:

- **Page Setup**
- **Print Preview**
- **Print**

and **printing of the Gantt diagram**.

These operations are initiated from File menu or from “Printing” toolbar:



Page Setup dialog

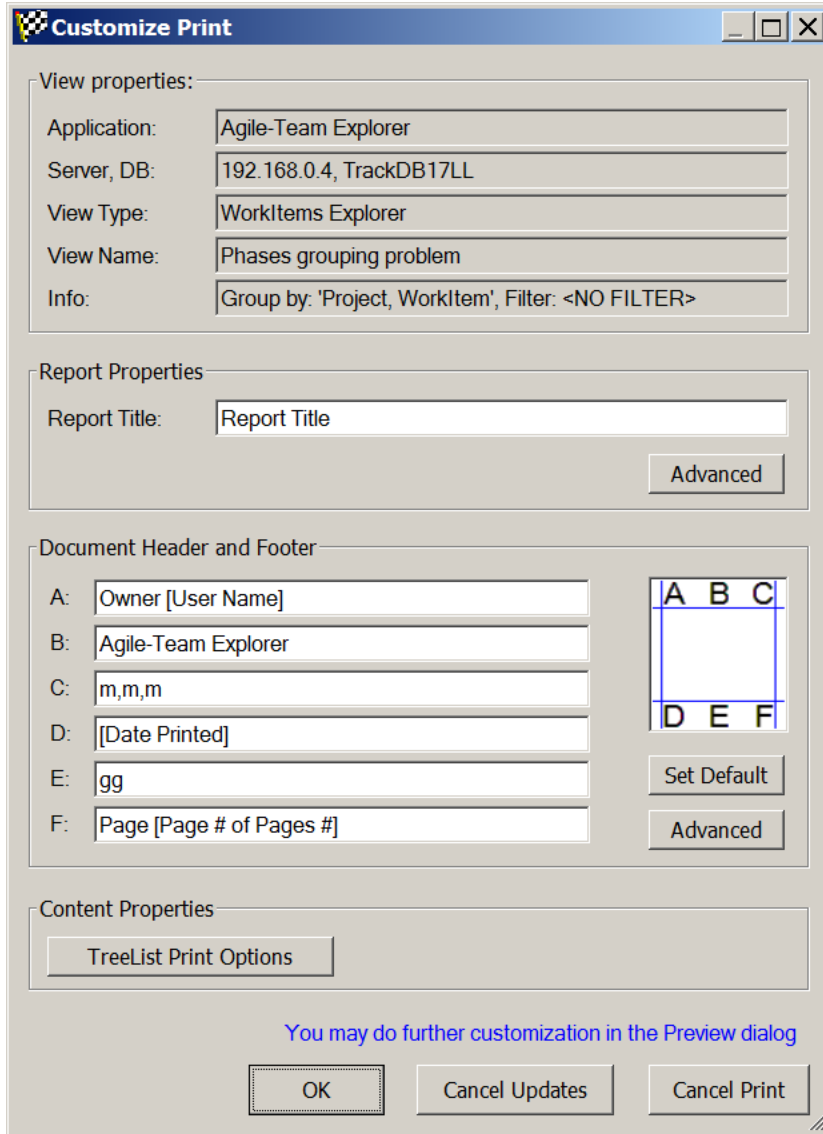
Page Setup calls a standard Windows [Page Setup dialog](#).

Note: Page Settings are saved/restored separately for each kind of View, i.e. Explorer, Daily, Monthly, etc.

Print and Print Preview

Print and Print Preview both call Customize Print dialog, where you can set various properties:

1. Report Title, its position and Font
2. Header and Footer, their position and Font
3. Set Properties of document content (some fields can be optionally included/excluded)



Customize Print

View properties:

Application: Agile-Team Explorer

Server, DB: 192.168.0.4, TrackDB17LL

View Type: WorkItems Explorer

View Name: Phases grouping problem

Info: Group by: 'Project, WorkItem', Filter: <NO FILTER>

Report Properties

Report Title: Report Title

Advanced

Document Header and Footer

A: Owner [User Name]

B: Agile-Team Explorer

C: m,m,m

D: [Date Printed]

E: gg

F: Page [Page # of Pages #]

Set Default

Advanced

Content Properties

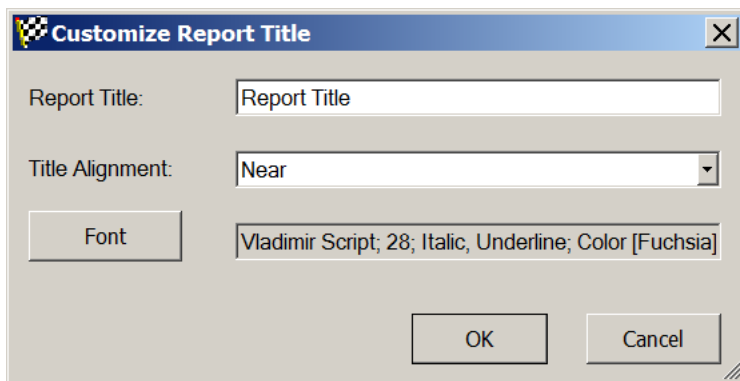
TreeList Print Options

You may do further customization in the Preview dialog

OK Cancel Updates Cancel Print

Report Title

“Advanced” button in “Report Properties” calls a dialog “Customize Report Title”:



Customize Report Title

Report Title: Report Title

Title Alignment: Near

Font

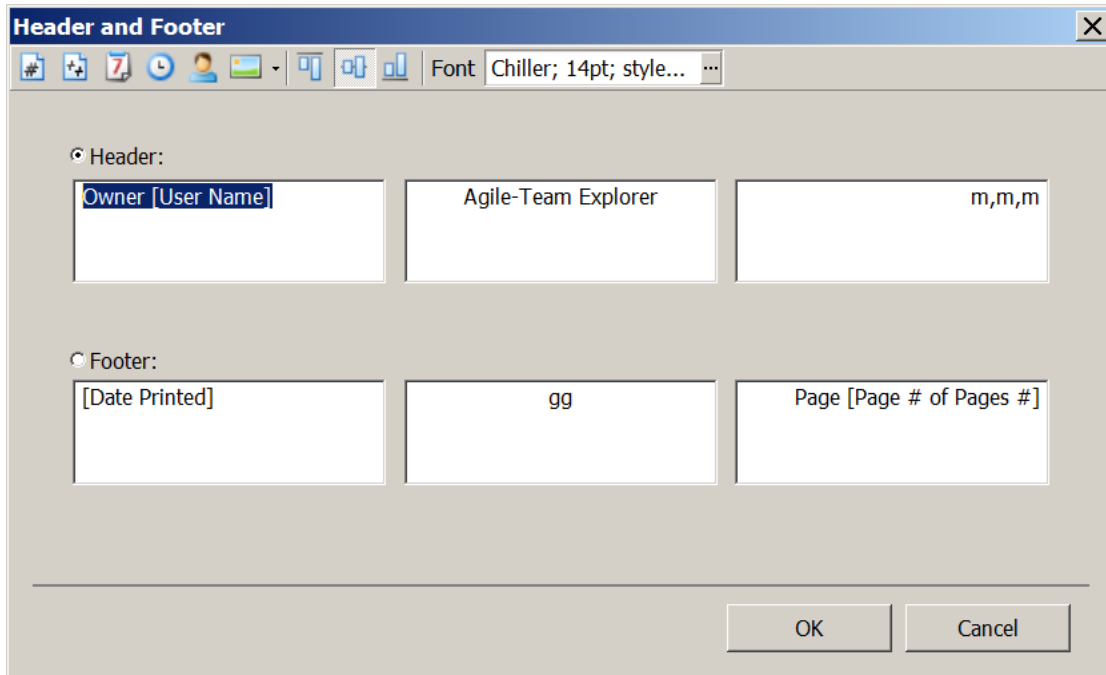
Vladimir Script; 28; Italic, Underline; Color [Fuchsia]

OK Cancel

Header and Footer

There are 3 Header fields and 3 Footer fields (A, B, C and D, E, F in Customize Print dialog): left, middle and right.

“Advanced” button calls “Header and Footer” dialog that provides convenient way to customize Header and Footer.



Toolbar of the “Header and Footer” dialog contains built-in patterns for frequently used strings:

-  - Page Number
-  - “Page K of Pages N”
-  - Date
-  - Time
-  - User Name

Also you can change vertical alignment of the strings:



Here you can see the result of previous settings:

Header:

Owner !!

Agile-Team Explorer

m, m, m

Report Title

ID	Title	Start	Finish	FirstTR_	LastTR_	Originator
Leo	Leo	02.07.2009	07.07.2009	26.05.2...	06.07.2...	
G1	G1	02.07.2009	03.07.2009	26.05.2...	28.05.2...	
043086	A11	02.07.2009	03.07.2009			Elena Lisenenkova
043087	A11	02.07.2009	03.07.2009	26.05.2...	28.05.2...	Elena Lisenenkova

Footer:

<i>10.07.2009</i>	<i>gg</i>	<i>Page 1 of 2</i>
-------------------	-----------	--------------------

The default values for Header and Footer strings are set by “Set Default” button. They are:

Document Header and Footer

A:

B:

C:

D:

E:

F:

A B C

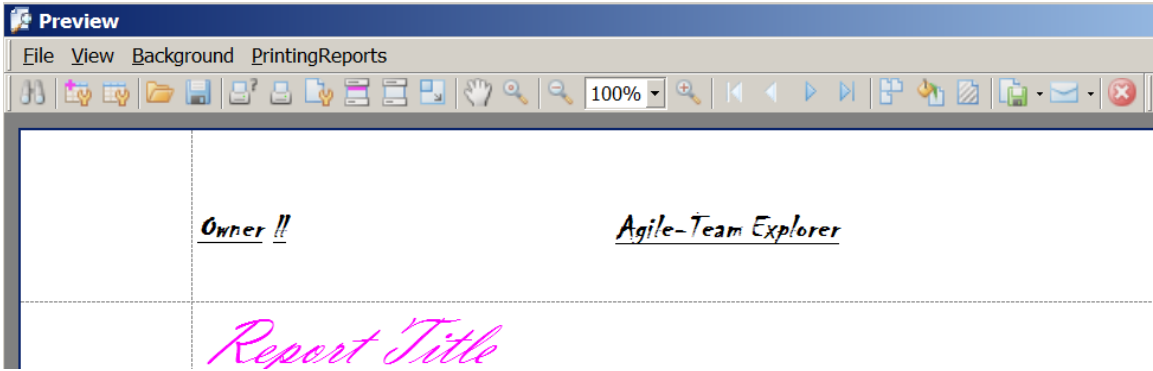
D E F

Set Default

Advanced

Preview Dialog

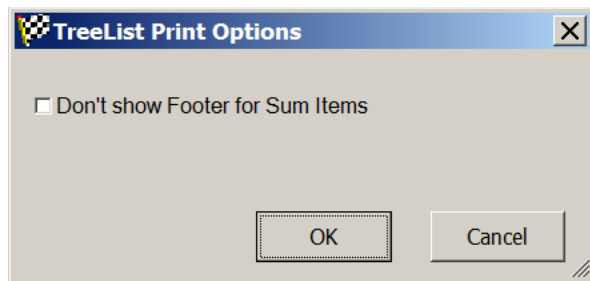
Further customization of the document can be done inside the Preview dialog.



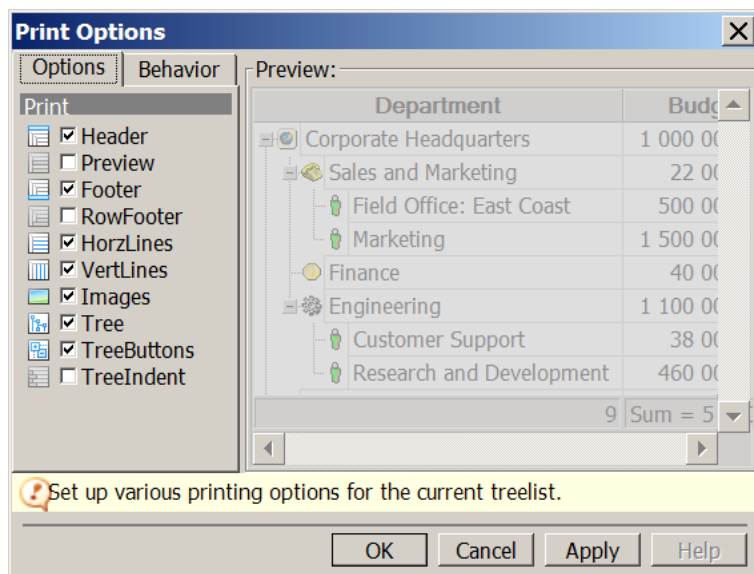
Toolbar buttons that provide customization:

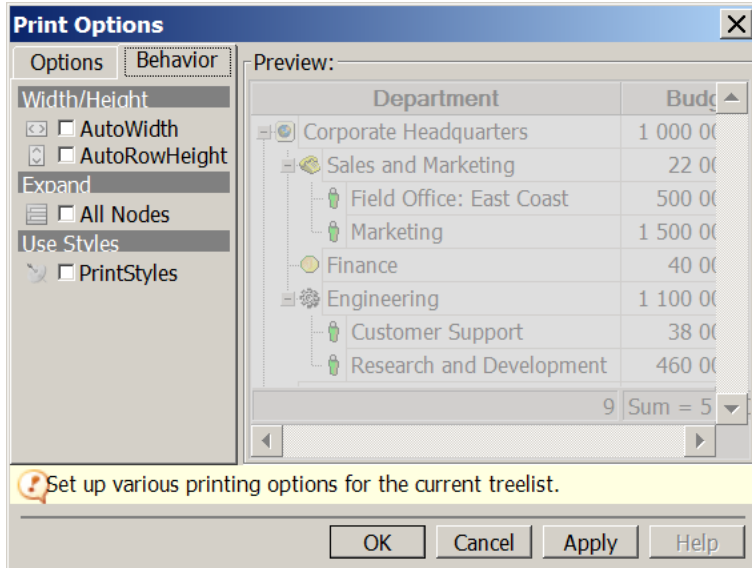
-  - Customize TreeList
-  - Customize
-  - Page Setup
-  - Customize Report Title
-  - Header and Footer dialog

“Customize TreeList” calls **“TreeList Print Options”** dialog that now contains only 1 Option: include or exclude Footers of TreeList (TreeList is an underlying control of the most Agile-Team panes)



“Customize” calls **“Print Options”** dialog where you can make various modifications on the fly and see their result in the sample **“Preview”** box before actual applying.

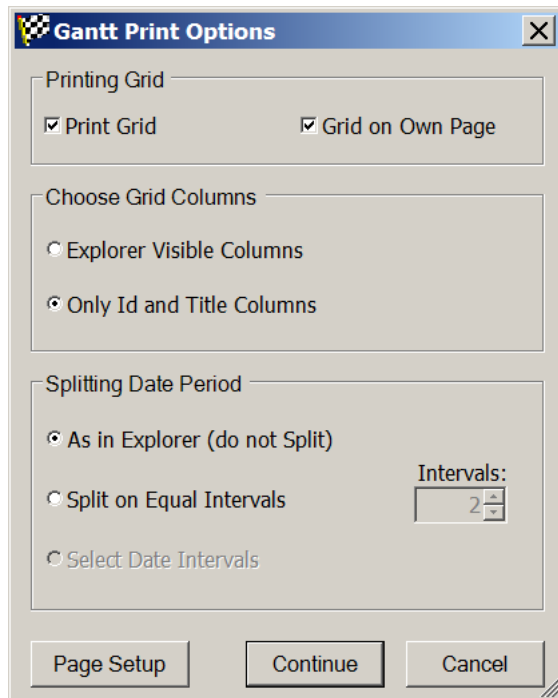




Printing Gantt diagram

Use menu “File -> Print Gantt” to initiate printing of the Gantt pane.

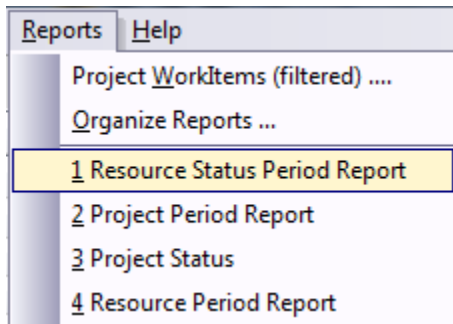
You will see “[Gantt Print Options](#)” dialog, where you can define which Explorer columns (if any) to include in print document and date intervals.



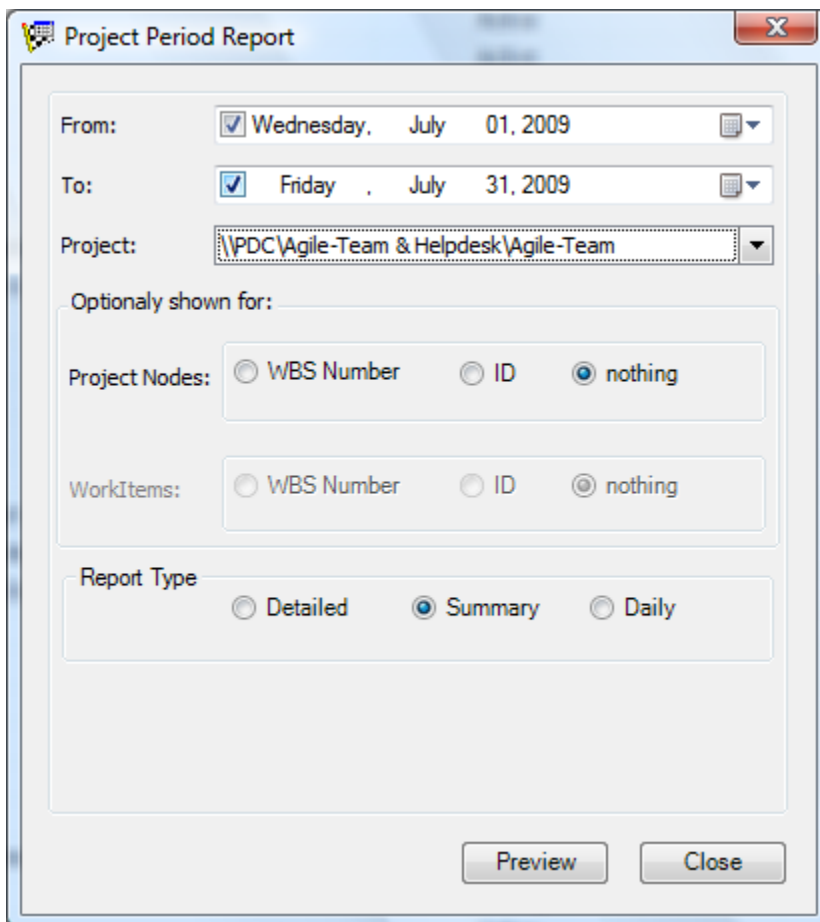
Paper Reports

Agile-Team shipped together with several predefined Reports. New Reports can be designed and added under special support agreement.

In order to produce some Report, just select it from Reports menu and fill out Parameters dialog:



The Parameters dialog is specific for each Report type. The example of such dialog is shown at the picture below:

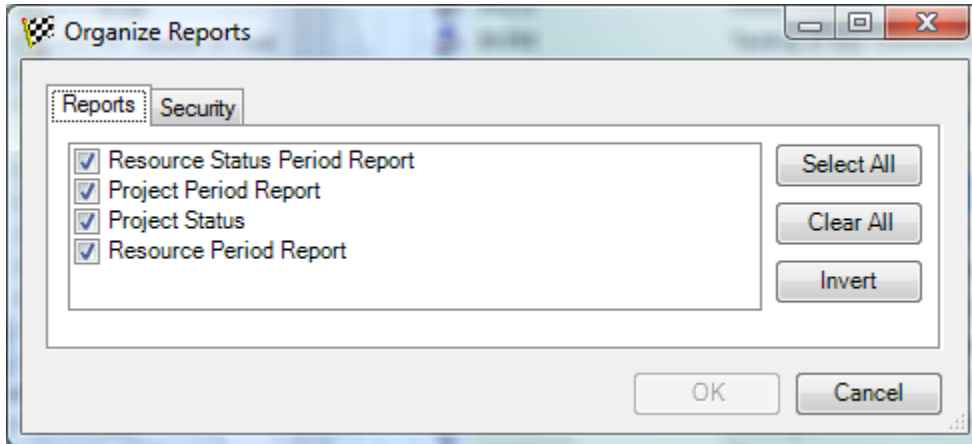


You can see that it is possible to produce three different Reports using this Report type: **Detailed, Daily and Summary.**

How to organize Reports

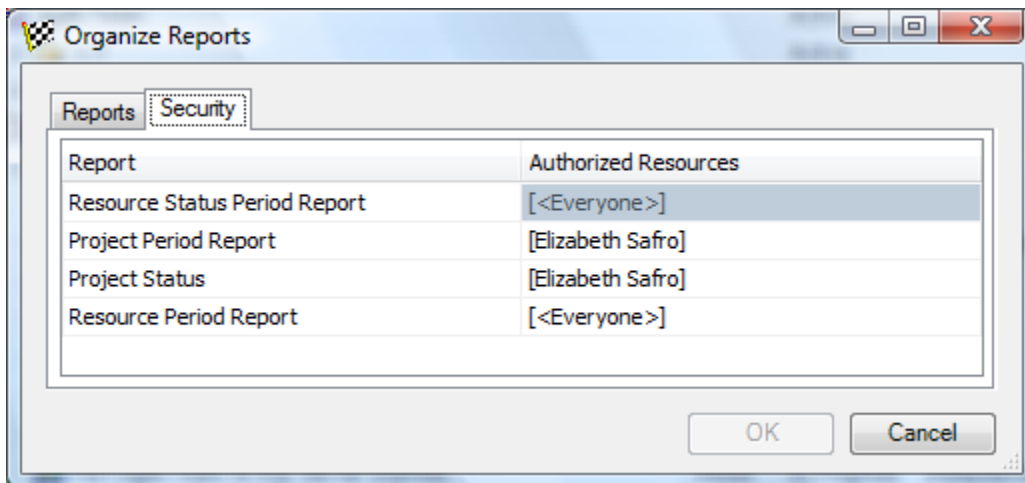
Agile-Team allows setting whether specific Reports are available for all Users, or only for dedicated Users.

In order to set what Reports are available for different Users, use [“Organize Reports” dialog](#).



This dialog has **two** pages. First page, named **“Reports”** enlists all Reports available for given User. You can freely select which Reports from this list will be available in the Reports menu.

The second page, named **“Permissions”** determines which Reports are available for different users. In order to be able to administer Reports permissions, you need special [Manage Reports](#) rights, or need to be an Administrator.

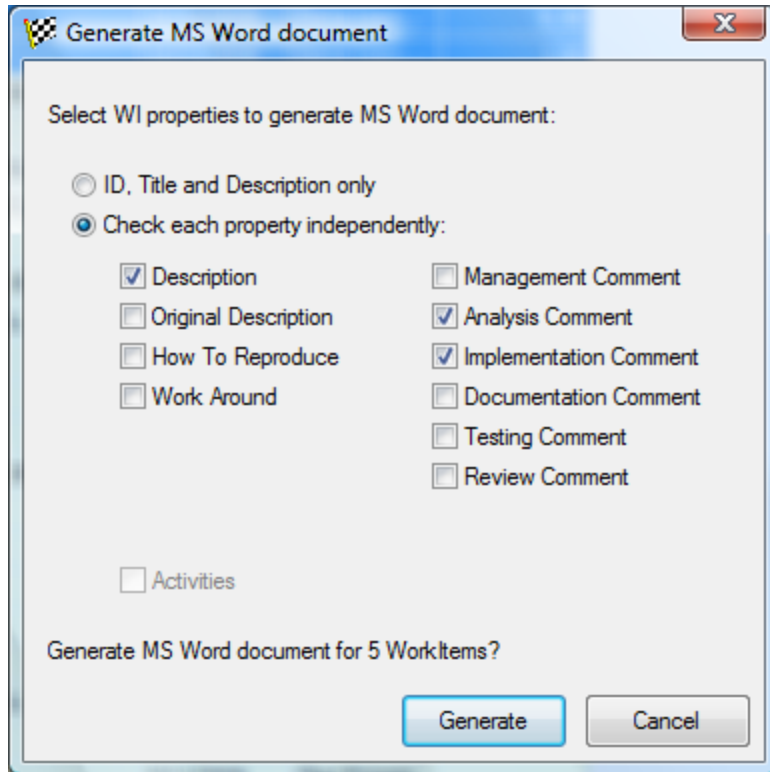


Using this page you can set which Resources are authorized to use different Reports. Only Reports that available for given user will appear in the list at the first page of this dialog for this user.

Project WorkItems Report

Agile-Team offers a convenient tool that allows you to generate Microsoft Word Document from selected WorkItems. In order to do it, just select some WorkItems in WorkItem Explorer and choose menu command Reports/Project WorkItems (filtered).

The parameters for generated documents are controlled using the following dialog:



The example of generated document is shown below:

Agile-Team: Properties of WorkItem List

Refactoring of classes system

<u>ID:</u>	<u>Created:</u>	<u>Kind:</u>	<u>Priority</u>	<u>Originator:</u>	<u>Status:</u>	<u>External ID:</u>
41827	5/6/2008	Task	4	Eugene Udovichenko	Done	
<u>Parent:</u>	PDC\Agile-Team & Helpdesk\Agile-Team\1.7					
<u>Part:</u>	Agile-Team					
<u>Phase:</u>	Agile-Team\1.7 Stage II MS1					
<u>WBS Number:</u>	14.8	<u>Active State:</u>	Closed	<u>Obsolete:</u>	No	

Description

The existing cBLogic class (actually Data Access Layer) is not an independent layer, but is fully linked with many Agile-Team classes. It is needed to continue the separation of the layers. In order to make Agile-Team application module oriented it is needed continue moving of classes to a separate project 'Core'.

Workspace Customization

Agile-Team offers a full suite of tools to customize the working environment. These tools include WorkItem Explorer Named Views and tools for design and organizing of Layouts for WorkItem Dialog and WorkItem Pane.

Any time you can reorder visible columns, change grouping, sorting, apply various filters, change display format for data of different types, etc.

All Views in Agile-Team like WorkItem Explorer, TimeReport Views or Dimension Views can be customized interactively. Agile-Team saves all changes automatically and restores them next time the View will be activated.

In contrast with other Views, WorkItem Explorer allows to have as much customized and saved “named” Views as you want.

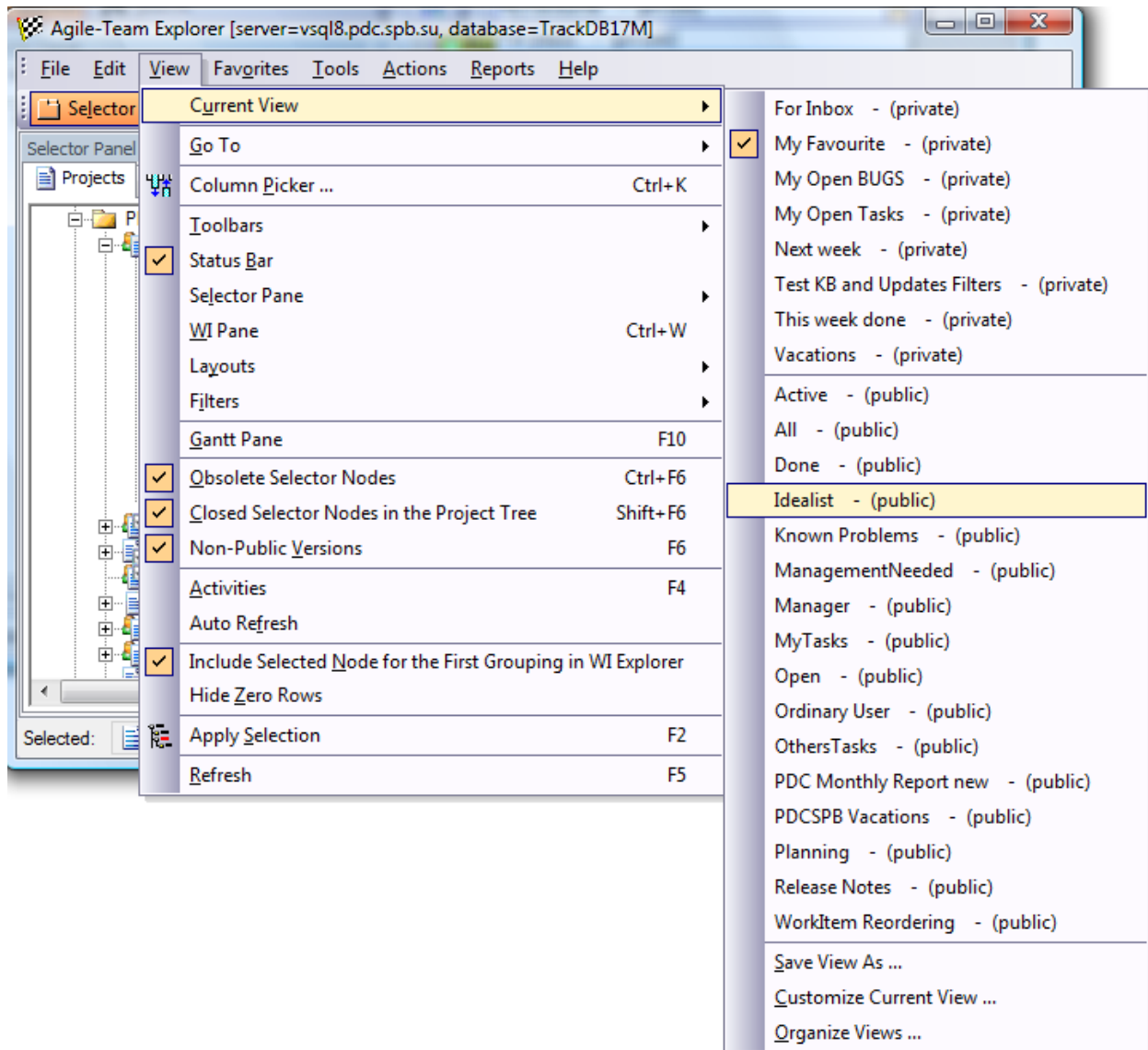
WorkItem Explorer Named Views

Agile-Team organizes customized and saved workspaces as named Views. Once the workspace is tuned, it can be saved and then reused, or even added to Favorites or sent to other users by e-Mail, so that they can look at the Project “from your eyes”.

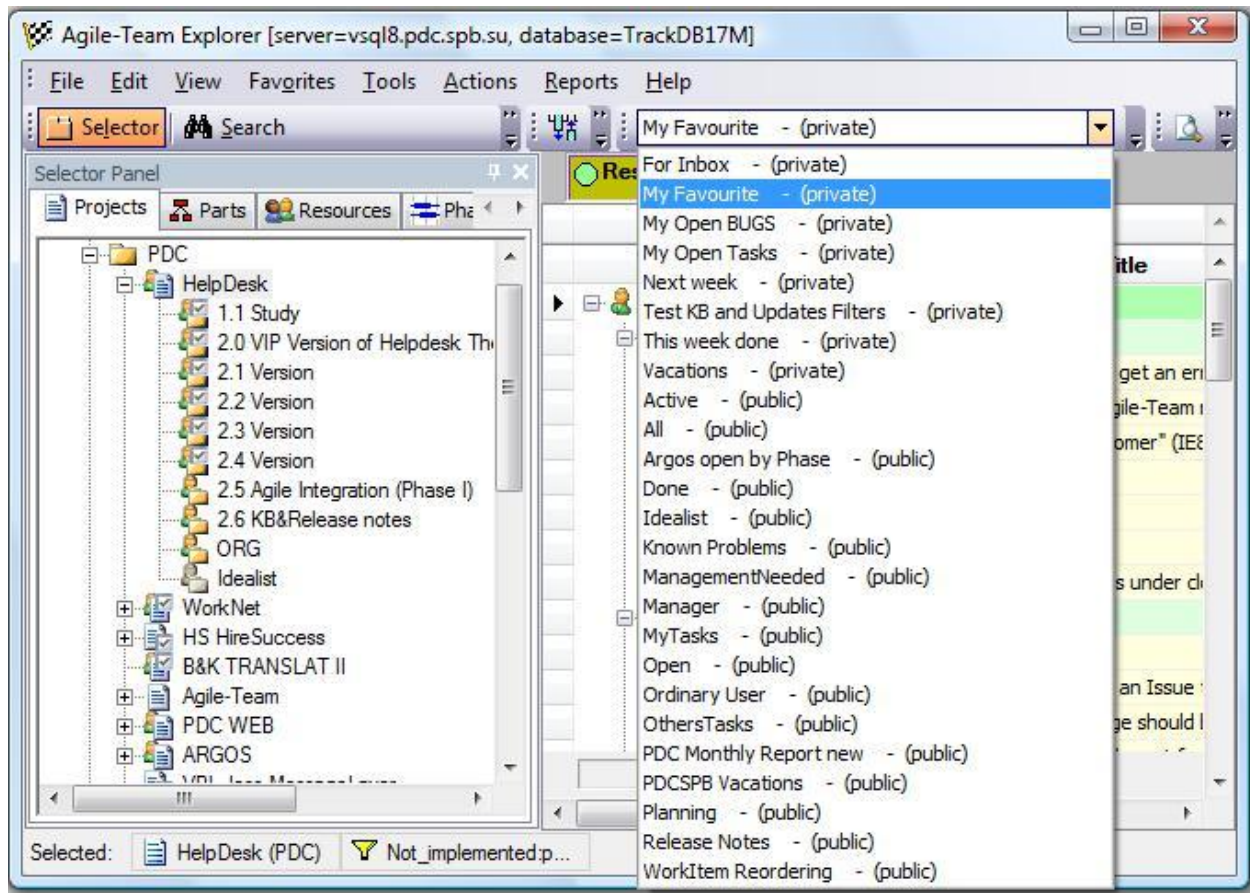
Agile-Team supports both Public and Private Views. Public Views are available for all users, but Private Views are defined by each user for his/her own needs. In order to be able to modify Public Views, user must have special [Permission](#).

In order to apply any of previously designed and saved Views you can choose it from menu

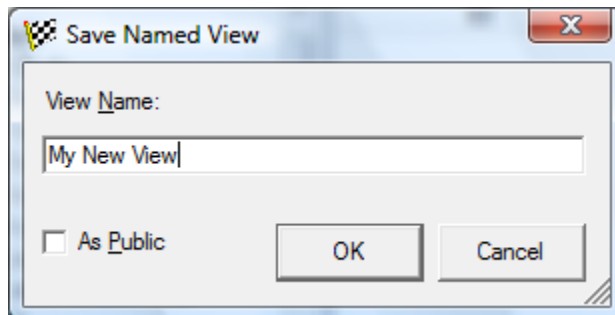
View/Current View:



Or, you can select a View from the Main toolbar:



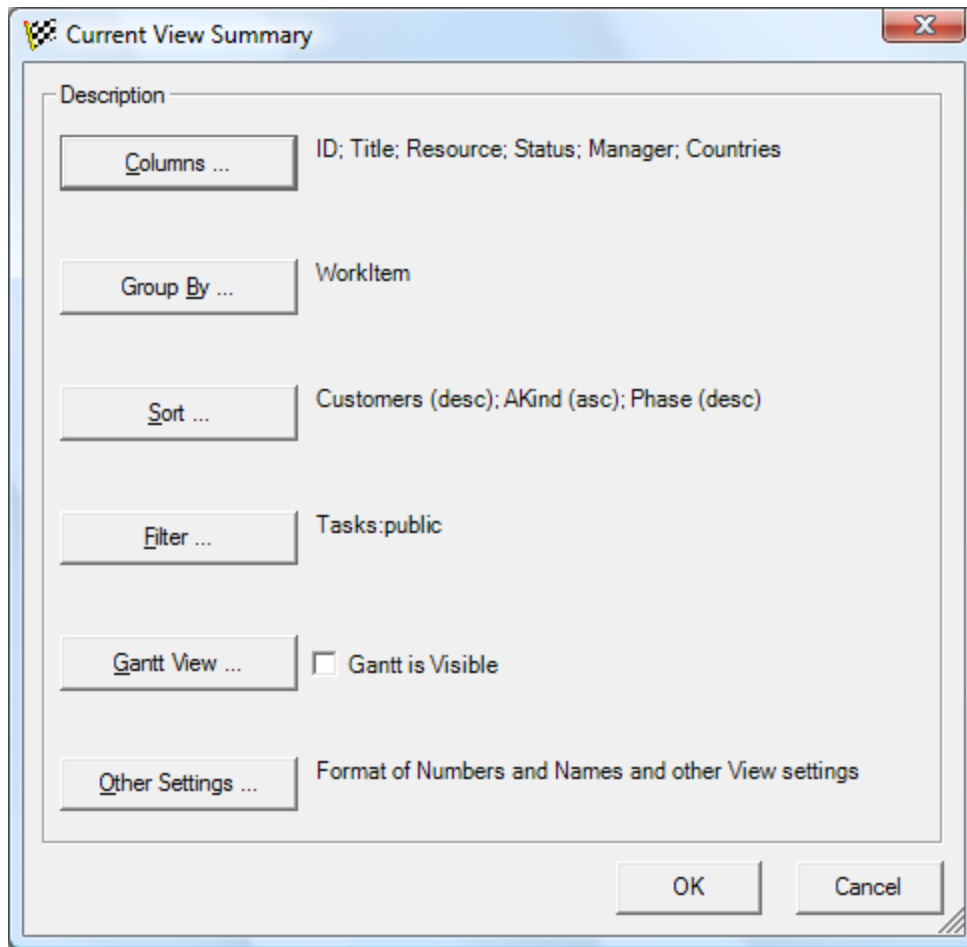
As we told before, once customized, WorkItem Explorer can be saved as Named View for further reusing. It can be performed with the menu command **View/Current View/Save View As**. In the simple dialog, shown below, you just type the name for the new View and set whether this View will be public.



Notice, that in order to create, modify or delete Public Views you need special [Permissions](#).

View Customization

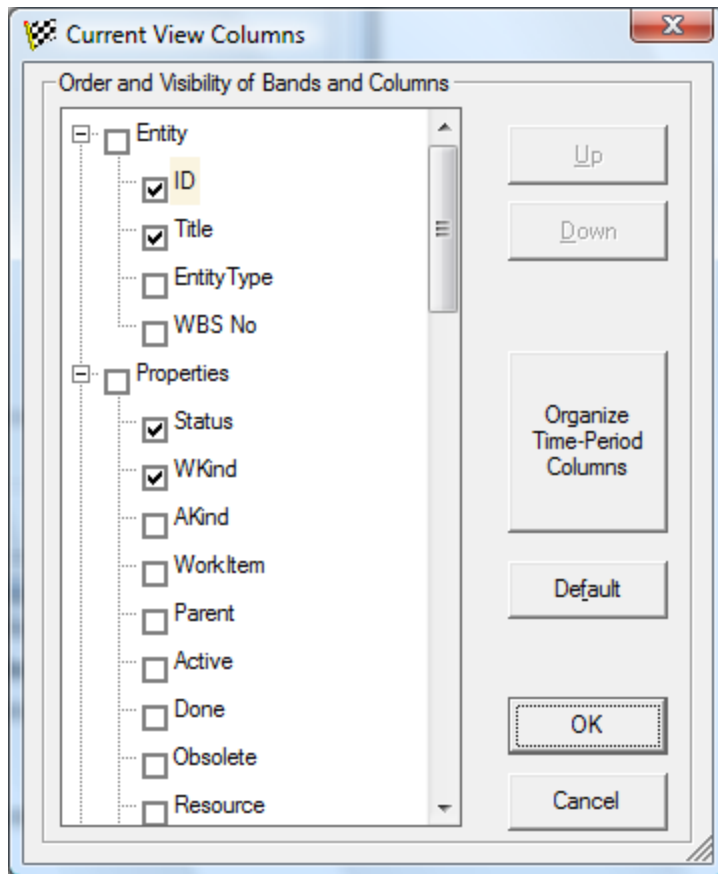
While almost all customizations can be made interactively, like columns dragging, or similar action, Agile-Team offers full-featured dialog based tool for detailed WorkItem Explorer customization. This tool can be invoked with menu command **View/Current View/Customize Current View**.



This dialog summarizes Current View settings and provides you with ultimate set of tools needed to change every setting. It contains six buttons to call specialized dialogs for customizing **Columns, Grouping, Sorting, Filtering, Gantt View, Format of Numbers and Names and other setting**. Summary of each of setting Group is displayed to the right of corresponded button.

Columns Customization

When you press “Columns” button Agile-Team will bring the following dialog:



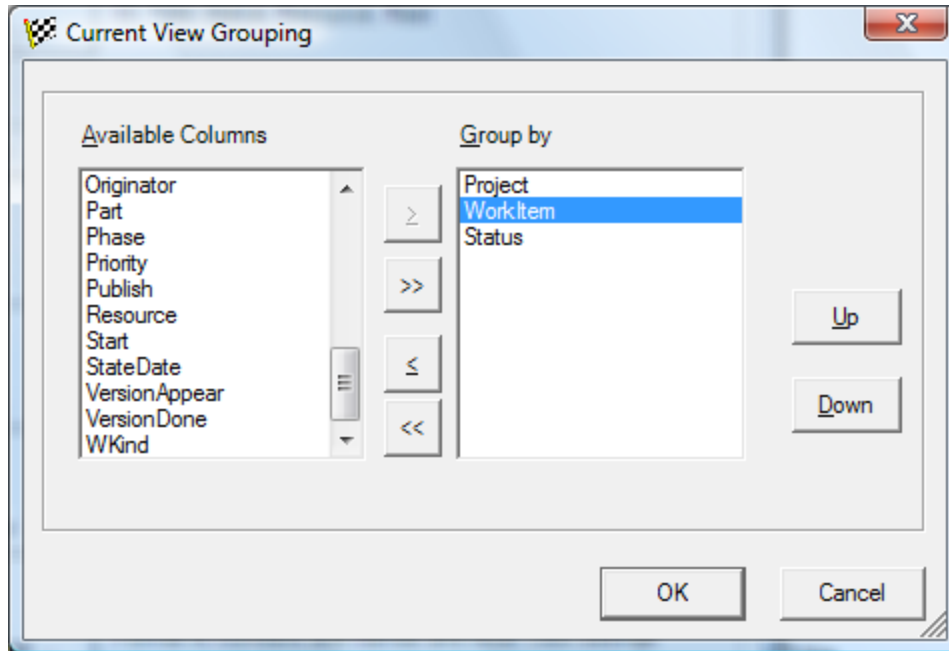
Here you can tune the order and visibility of all [WorkItem Explorer Columns](#). In order to set some column Visible or Invisible, just check the box for given column. If you want to change the order of Column or Band, just select it in the tree and move upper or lower using **Up** and **Down** buttons.

It is possible to organize [Time Period Columns](#) also. Press the button with such label and the proper dialog will appear. Selected Time Period Columns will be listed under **Time** branch of the tree.

In order to return to factory settings press **Default** button. Then only following columns will remain: **ID**, **Title**, **WorkItem**, **Status**, **Resource**, **Used**, **Rest**, and **Total**.

Grouping Customization

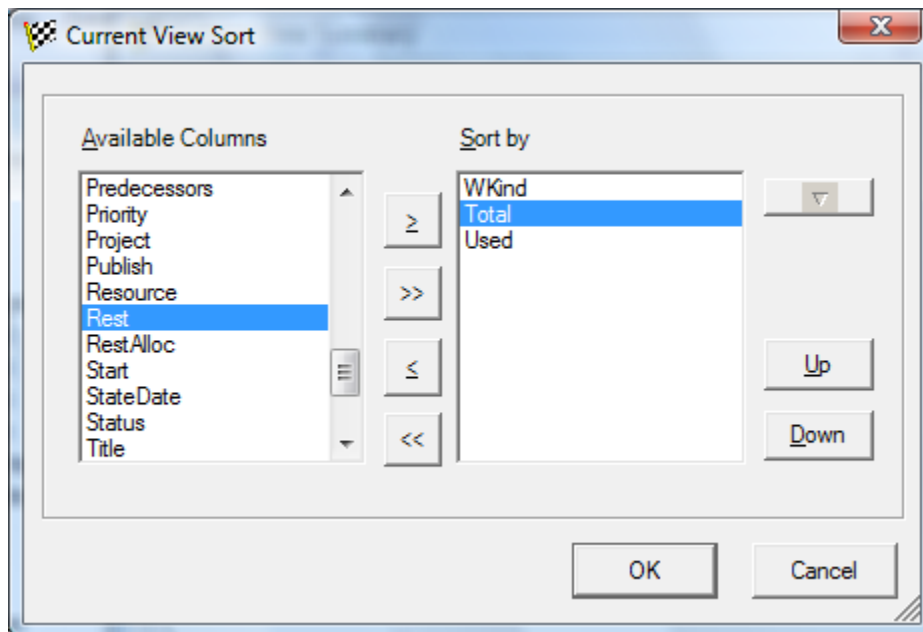
Column Grouping is handled using the following dialog:



Available Columns list box contains all [WorkItem Explorer Columns](#) (which allow grouping), except those included in grouping already. **Group By** listbox contains columns on which the grouping is performed by. In order to change grouping order press **Up** and **Down** buttons.

Sorting Customization

Column Sorting is handled using the following dialog:



Available Columns list box contains all [WorkItem Explorer Columns](#) except those for which the sorting has been appointed already. **Sort By** listbox contains columns on which the sorting is performed by. In order to change sorting priority press **Up** and **Down** buttons. At the picture above the sorting will be

performed by **WKind**, then by **Total** and finally by **Used**. The Sort order, i.e. Ascending or Descending is controlled by button with small triangle icon. Just press this button to switch the Sort Order.

Filter Setting

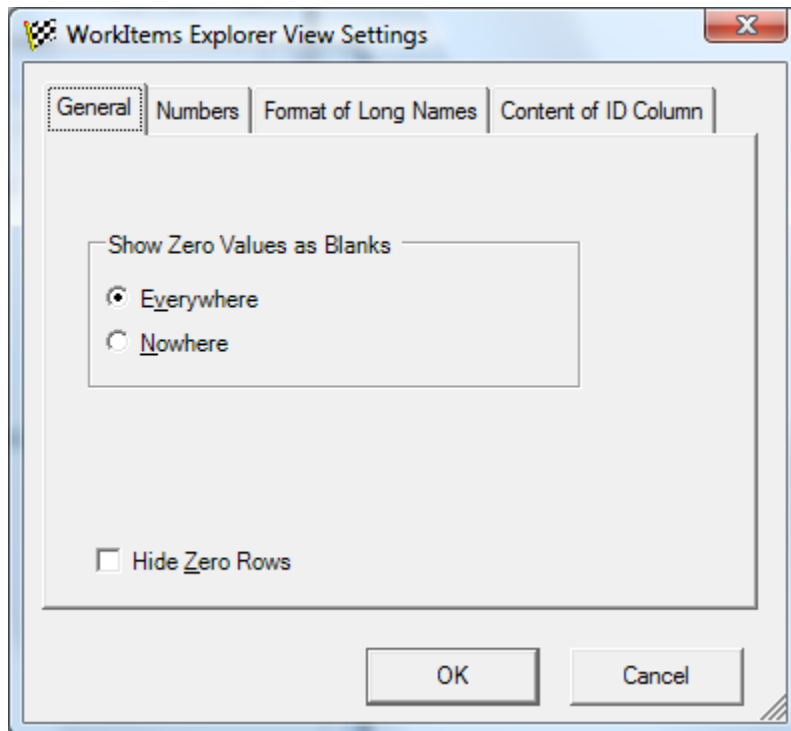
It is possible to associate any filter with the View. Just press **Filter** button and Agile-Team will show standard [Filter dialog](#) that allows you to choose existing Filter or to design a new one.

Gantt View Options

In order to customize Gantt View press corresponded button. Agile-Team will show the [Gantt Options](#) dialog box. You can quickly set the visibility of the Gantt pane also with proper checkbox.

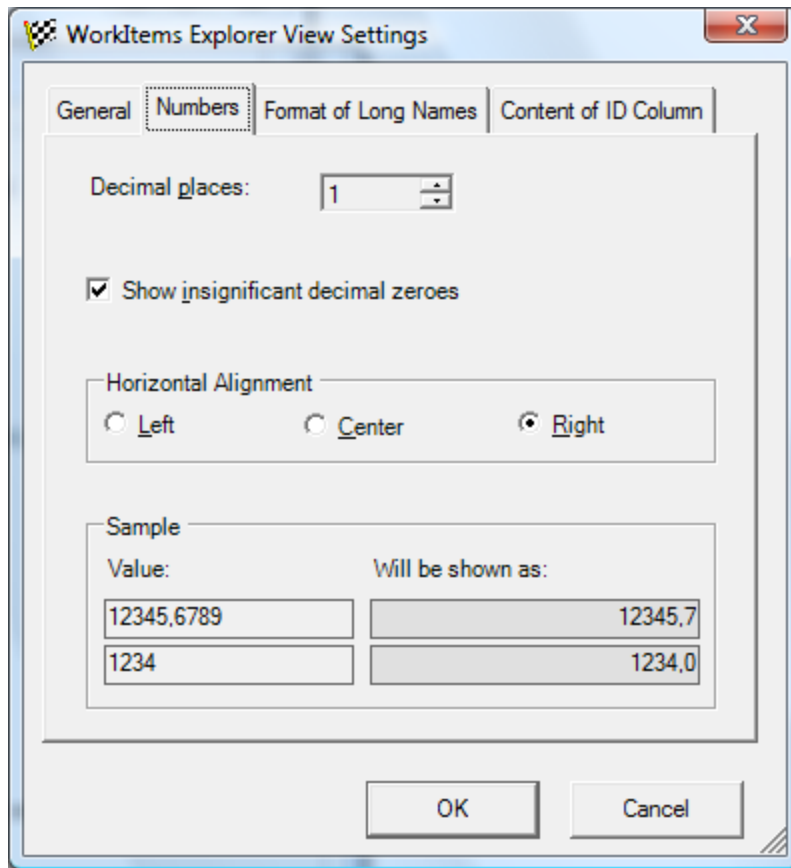
Other Settings

Press this button if you want to tune such parameters as Number Format, Entity Name Formats, etc. These various settings are available through the following dialog box:



At the **General** page of this dialog you can set whether to show zero values as blanks in WorkItem Explorer. For example: if this option is set to **Everywhere**, then if **Rest Time = 0,0 hrs**, then Agile-Team will display empty cell, instead of zero value. Also, you can set to hide rows where all Time Columns contain zero values.

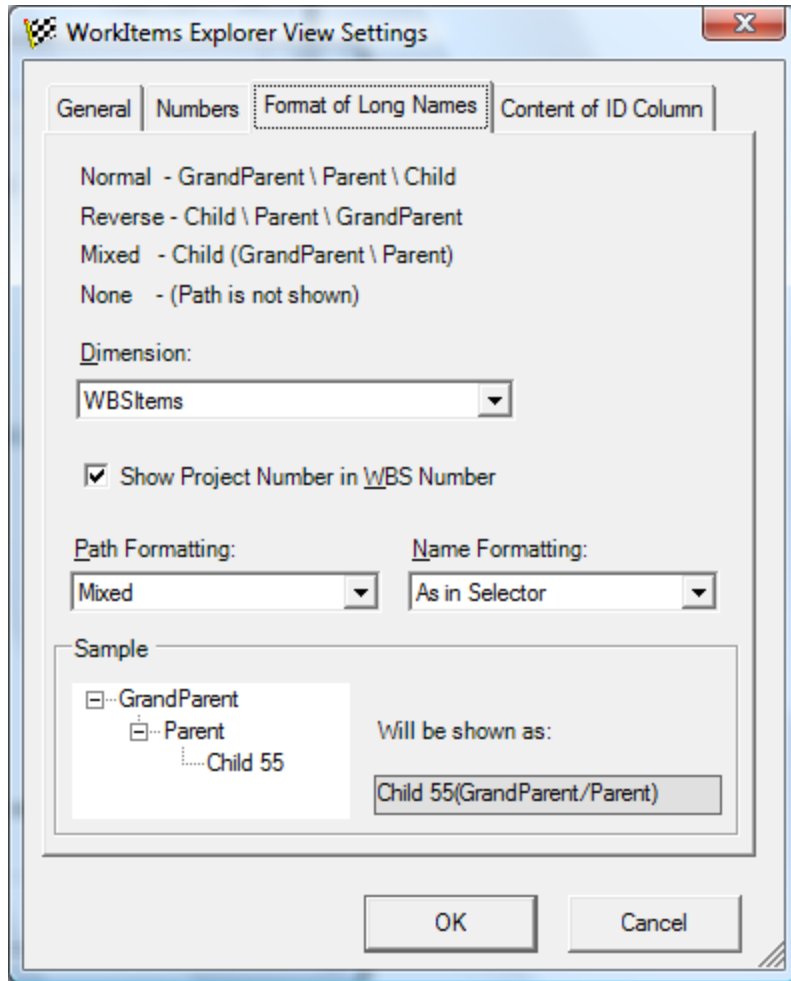
Format of Numeric Values can be set using **Numbers** page.



Here you can set how many decimal places will be displayed for numeric values, whether to show insignificant decimal zeroes, and to choose the desired alignment.

The sample of formatting of your choice will be shown immediately at the bottom of this page.

Format of Long Names, like Full path to any tree entities, say Projects or Parts is handled using the following page:



Agile-Team offers for type of formatting:

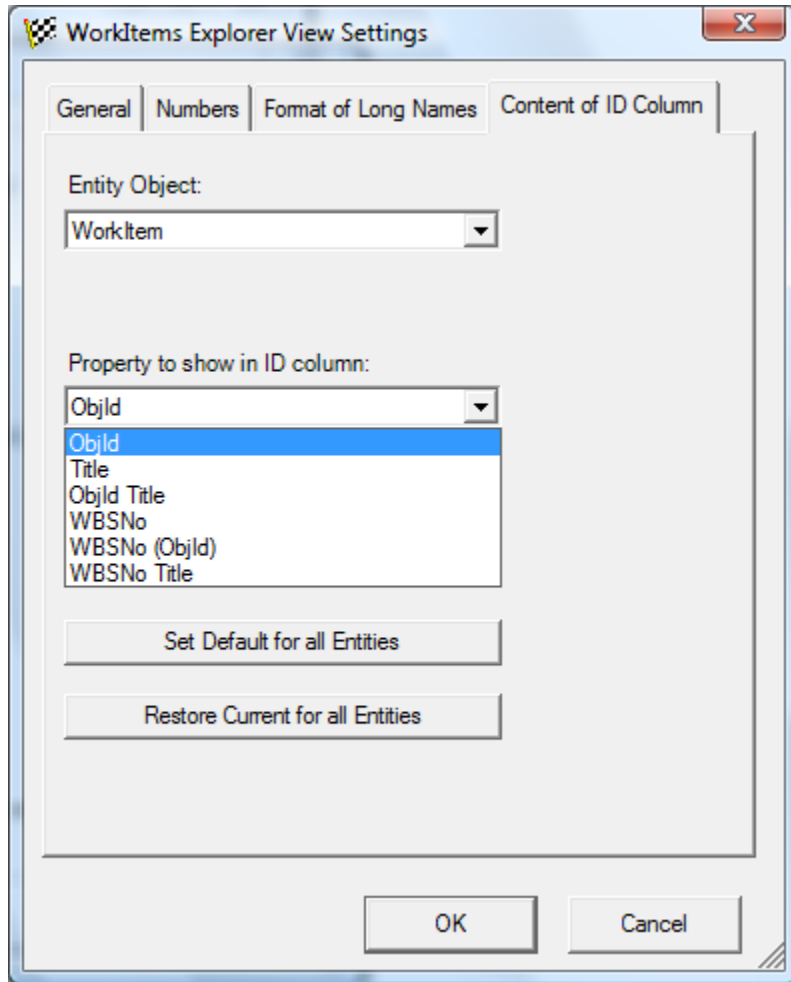
- | | |
|----------------|--|
| Normal | This is format similar to used by Windows for File Path. The path begins with the Root and ends with the given entity. All path elements are separated with slash character. |
| Reverse | The same as above, but path elements are in the reverse order. |
| Mixed | Using this format the full path starts with entity name itself, followed with the path to that entity from the tree Root enclosed in the brackets. |
| None | In this case the path to the entity is omitted. |

Agile-Team allows setting Long Names Formatting for every Dimension separately. As for WBS Dimension, it is possible optionally specify whether to **Show Project Number for WBS number**. If this checkbox is turned OFF, then first element for WBS number will be omitted.

Formatting for Path and Names are defined separately. Path formatting is chosen from one of four possible formats, described above. Name Format, i.e. the format of the entity itself, can be set to be **as in Selector**, or can be one of the following: **Title**, **Title Number**, **Number**, **Number Title**. Name Formats used in Selector are defined via [Local User Options](#).

The sample of formatting of your choice will be shown immediately at the bottom of this page.

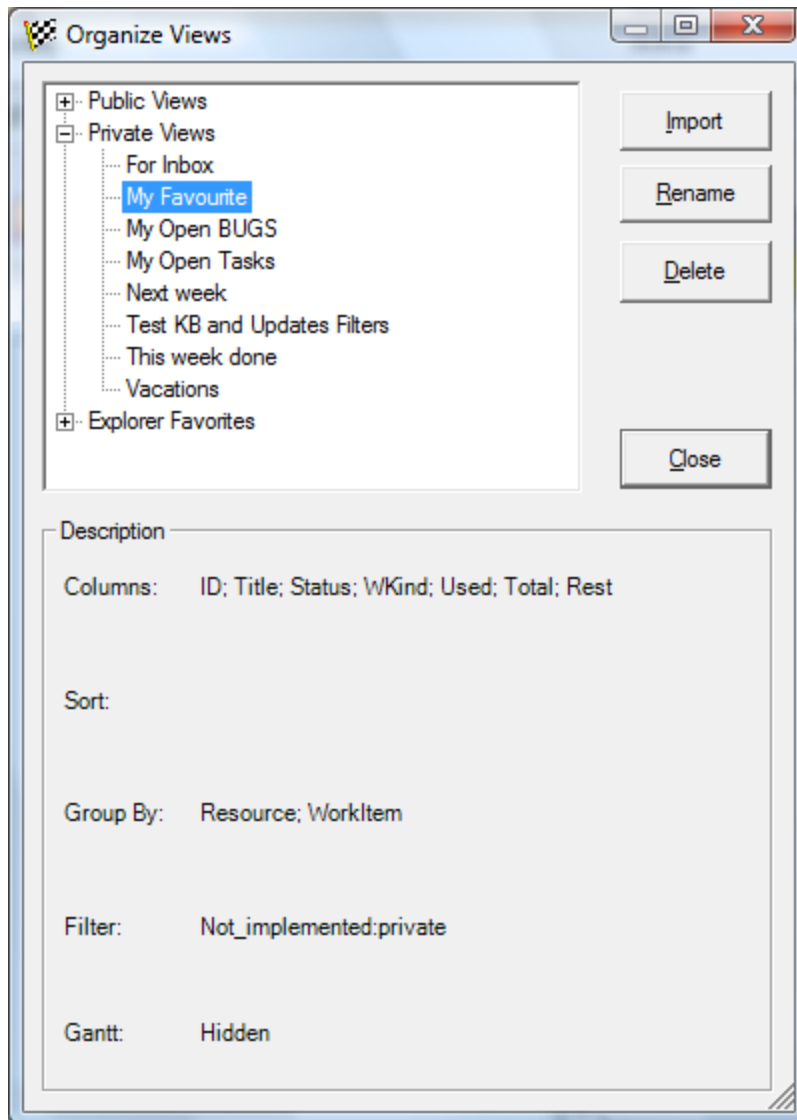
The latest page of the dialog defines what information will be shown in the **ID Column** of WorkItem Explorer:



Agile-Team allows substituting the content of ID Column for every Dimension, for WorkItems and for Activities. By default, this column displays the Object ID. But you can override this setting and choose to display Entity's Title, Number or combination of ID, Title and Number.

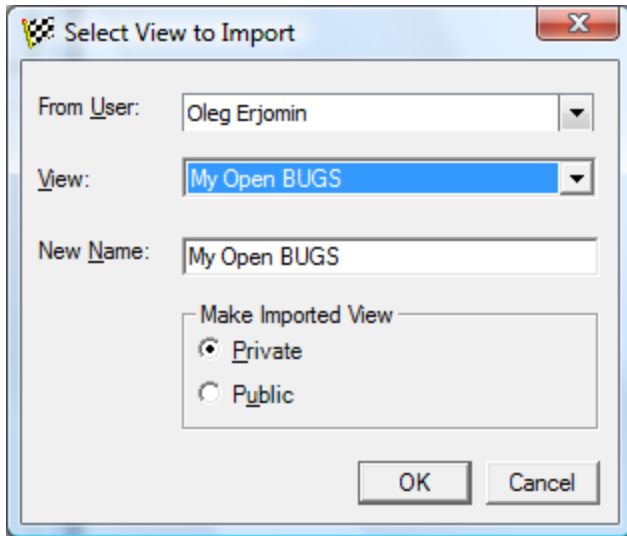
View Organizing

It is possible to organize Views under the **View/Current View/Organize Views** command:



Here it is possible to see the properties of public and private Views and Agile-Team Favorites, to **Import** Views from others users, to **Rename** or to **Delete** Views.

Pressing the **Import** button, you will get the dialog that handles the import of the Views. View importing is a convenient tool for sharing useful Views among Users, or for creating specialized Private and Public Views on the basis of the other person's Views.



- From User** Here you can select a User whose View you are going to import. If you choose <Everyone> node in this field, then Public Views will be shown in **View** listbox. If a certain Resource is selected, then his/her Private Views will be shown there. Notice that only Private Views with Public Filters will be shown, because it is not possible to refer to Private Filters of other users.
- View** This listbox displays a list of Public or Private Views, depending on the choice made in **From User** field.
- New Name** Here you can enter a new name for the imported View.
- Make Imported View** Here you can set whether the imported View will be Private or Public.

Notice, that in order to import Views as Public you should have [Manage Public Views](#) permission.

WorkItem Dialog and WorkItem Pane Layouts

WorkItem Dialog contains a lot of controls, which are intended to satisfy many needs of a user. But it is very often when some of the controls are not needed for current activities and spare a valuable space making working with Agile-Team less comfortable. Especially it is obvious when using of WorkItem Pane which usually has smaller size than WorkItem Dialog and therefore demands showing of the most important controls on the top. Allowing to a user to design layout of WorkItem Dialog is that Layouts are intended for.

Layout Functionality allows:

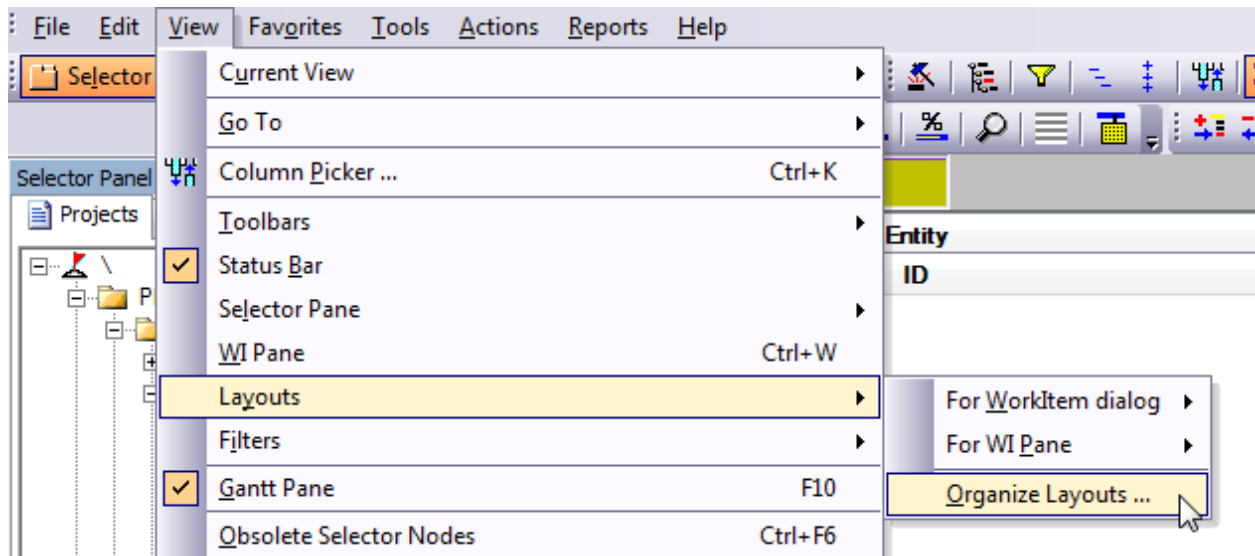
- Design new Layouts of WorkItem Dialog.
- Create new tabs in WorkItem Dialog.

- Move controls in any place of WorkItem Dialog.
- Hide unneeded controls.
- Save created Layouts.
- Assign the only Layout when opening of a WorkItem or assign a custom Layout for any Project or WBS Group.

Layout Management

The Layout Management dialog is started by the following menu item:

View -> Layouts -> Organize Layouts



All Layouts differ by the kinds: **Public** and **Private**. The concept of Public and Private Layouts is the same as the one of Agile-Team Filters:

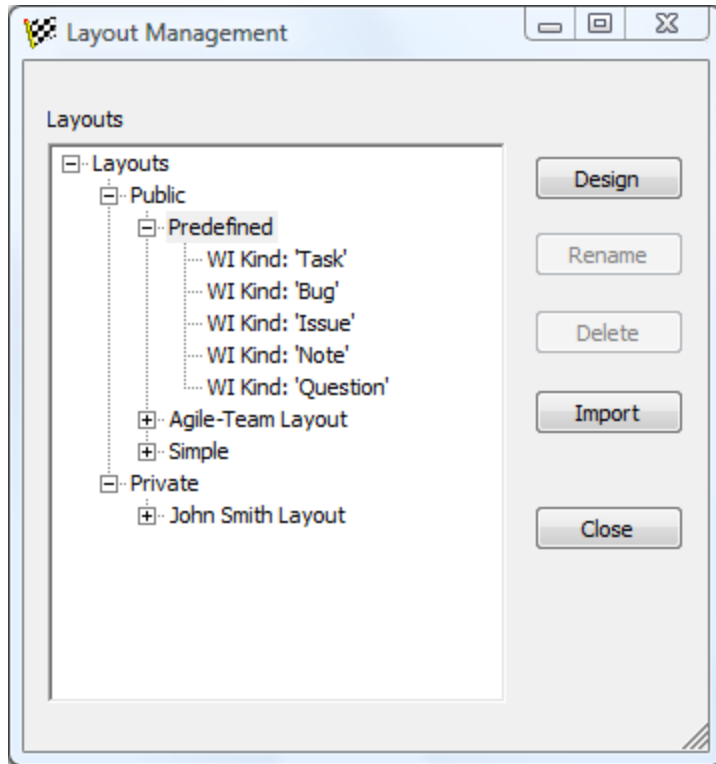
- A private Layout could be used by the only user that has created it.
- A public Layout could be used by all users.

Each Agile-Team has several predefined Layouts which are used in WorkItem Dialog and WorkItem Pane by default. Predefined Layouts cannot be deleted nor changed.

Agile-Team Layouts are associated with each WorkItem Kind and are applied to a WorkItem depending on its Kind. Set of Predefined Layouts includes Layouts for all WorkItem Kinds.

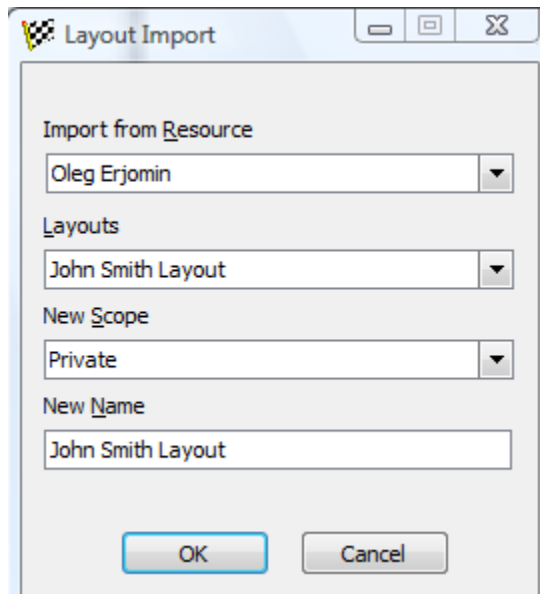
In order to delete or rename public Layouts you should be an Agile-Team administrator or have Manage Public Views and Layouts permission.

Predefined Layouts cannot be deleted or renamed.



Import of Layouts

Ones finding it necessary to use a private Layout designed by another user you may import it by using Layout Import dialog, which is run by Import button.



In the Layout Import dialog you should define the Resource which Layout you are going to import of and the private Layout for import. Besides you can define the scope of the imported Layout (Public or

Private) and the new name of the Layout. If new scope and new name will not be defined the imported Layout will have the same scope and name of the original Layout.

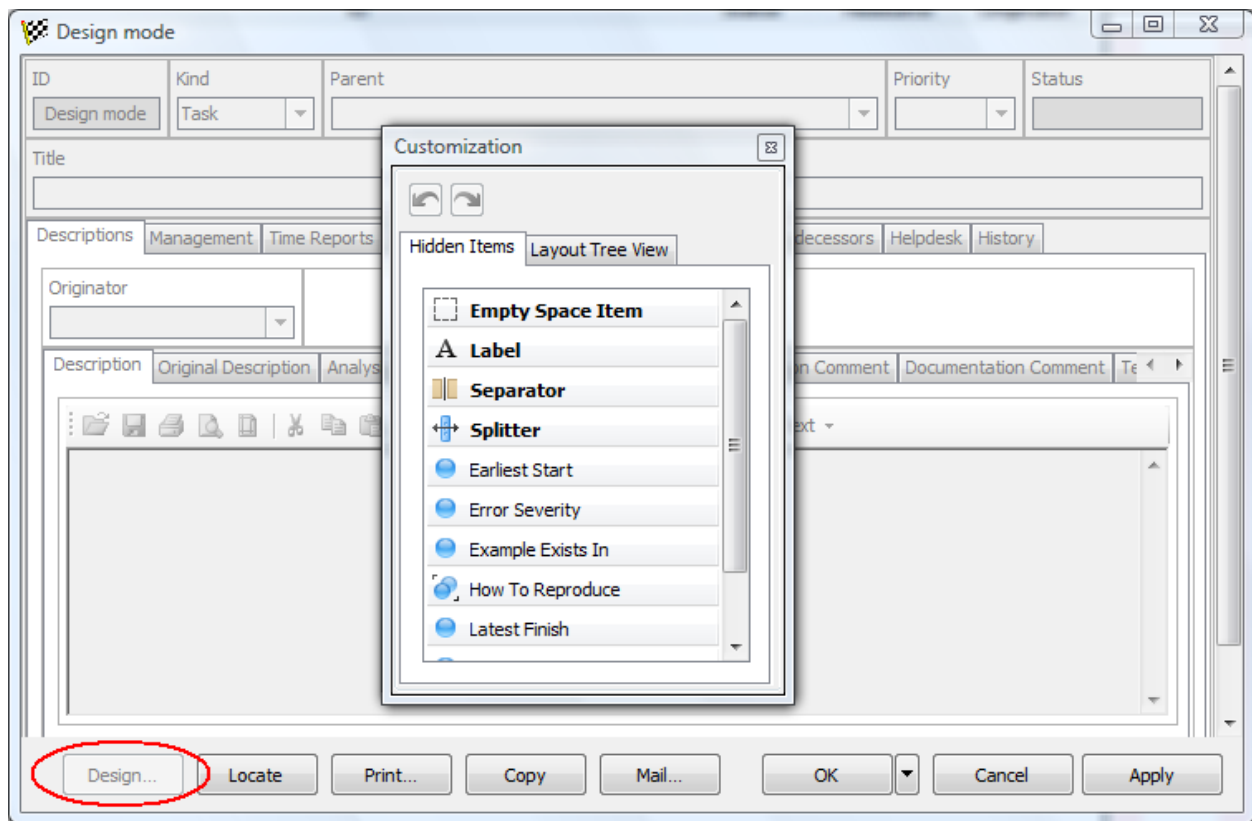
You may not assign to an imported Layout Public scope if you are not an Agile-Team administrator or do not have Manage Public Views and Layouts permission.

Layout Design

In order to create a new Layout you should select an existing Layout and press Design button.

When selecting in Layouts tree list of a node with a WorkItem Kind button Design will open a Layout corresponding to the kind. But with selection of a node with name of a Layout button Design will open a Layout for 'Task' WorkItem Kind.

Changing of Layout is only allowed when Customization form is activated. After closing of Customization form its reactivation is possible by Design button, which is added to the set of the ordinary control button of WorkItem Dialog (Locate, Print, Copy, Mail, OK, Cancel, and Apply). The buttons are the only controls, which cannot be customized.



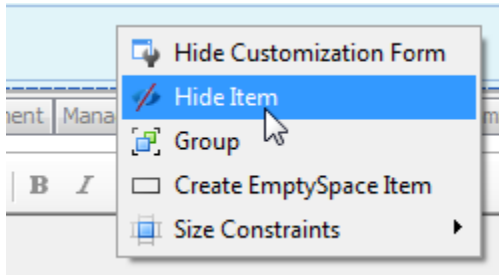
Moving a Control

Select a control (an element of Layout) and drag and drop it to the needed position.

Hiding a Control

First way: select a control and drag and drop it to Customization form. Record with the name of the control should appear in the Hidden Items list of the form.

Second way: call context menu of a control (by right mouse click) and select Hide Item.



Adding a control

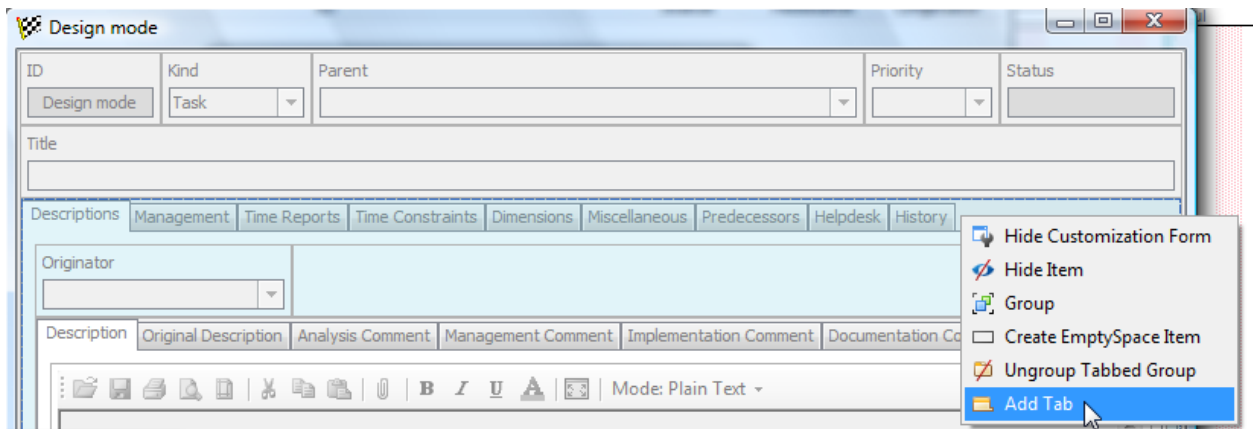
There can be added only the controls that were hidden or auxiliary Layout elements:

- Empty Space Item.
- Label.
- Separator.
- Splitter.

In order to add a control or an element select it in Hidden Items list of Customization form and drag and drop it to the needed place of Layout.

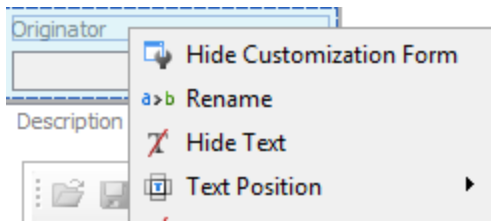
Adding a Tab

In order to add a tab you should call context menu (by right mouse click) in the free space of tab page captions and choose Add Tab.



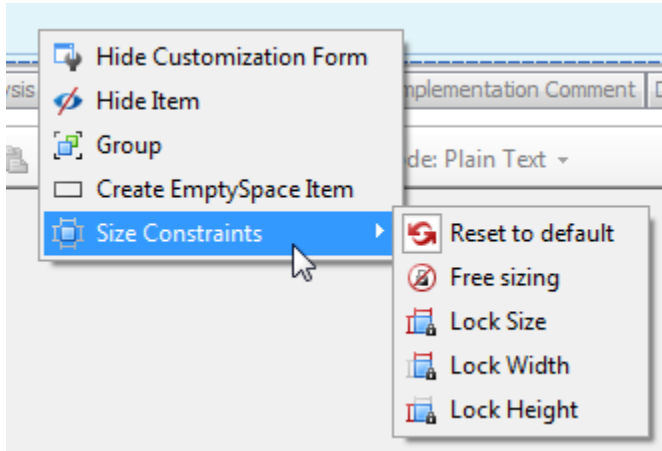
Changing Caption of a Control

Context menu of a control provides possibility to rename text (also by F2 shortcut), hide text or change its position.



Size Constraints

It is also possible to lock size of a control by Size Constraints item of the context menu of the control.



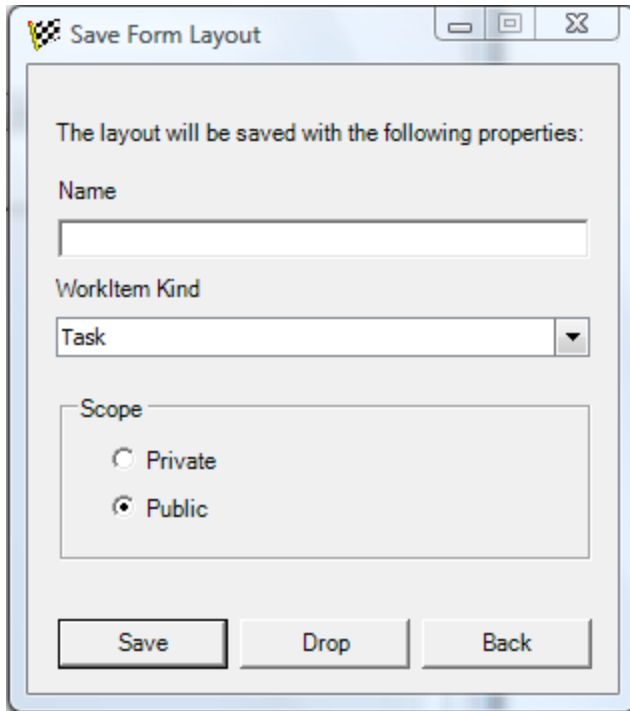
But you should be careful locking of a control size for it may spoil design of Layout when resizing of WorkItem Dialog. It is recommended to use Empty Space Items to control the size.

Grouping of Controls

Context menu item Group allows creating groups of controls. In order to create a group of controls select several controls by pressing left mouse button and holding Shift key. Then call context menu on a selected control and choose menu item Group. Group will be created. Now you can change the default name of the group to a more significant one.

Saving of Layout

In order to save changes of a Layout you should close Customization form. It will make Save Form Layout dialog appear.



Fields Name, WorkItem Kind, and Scope should be changed only when you are going to create a new Layout, except if you have changed a predefined Layout. In this case field Name will be empty.

Name 'Predefined' for a Layout is reserved and cannot be used for other Layouts.

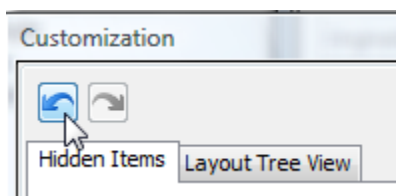
Save button saves changes in the opened Layout or creates a new one if Name, WorkItem Kind or Scope is changed.

You may not like to save a Layout as public if you are not an Agile-Team administrator or do not have Manage Public Views and Layouts permission.

Back button closes Save Form Layout dialog and returns to design mode.

Undo or Redo Changes

In order to undo or redo changes you should use arrow buttons in Customization form.



In order to drop all changes you may use Drop button in Save Form Layout dialog.

Using of Layouts

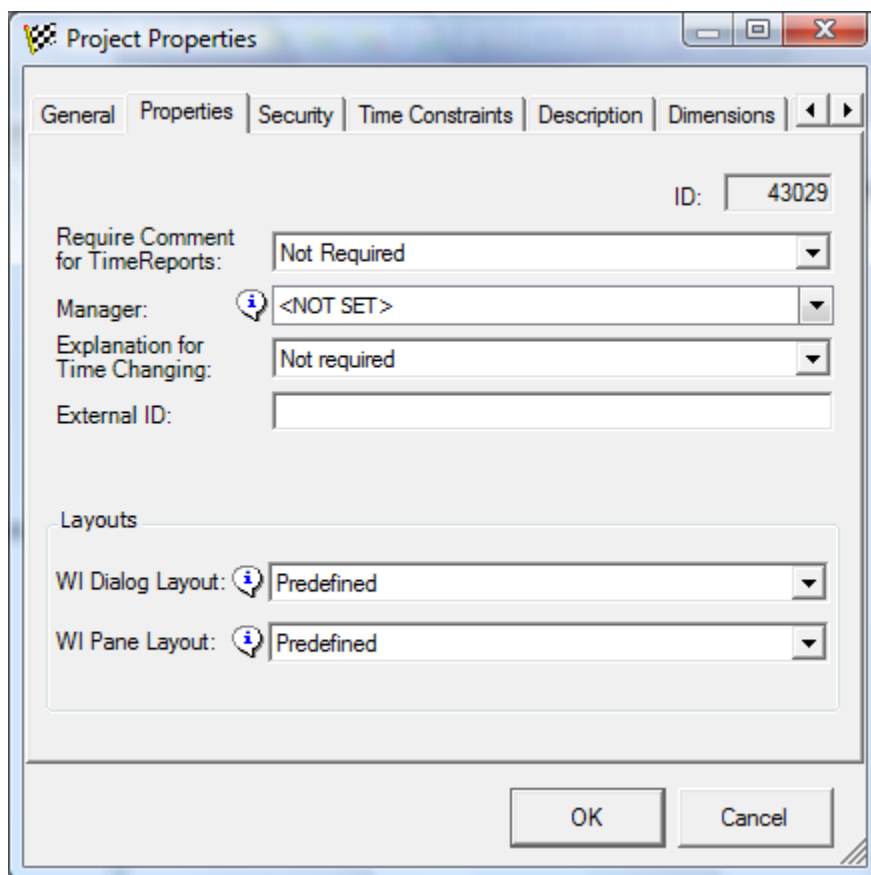
Assigning of a Layout to a Project

A project manager may find it useful to unify the look of all WorkItems belonging to his/her project. In order to do it he/her should create a new public Layout (or use an existing one) and assign it to Project or WBS Group. It could be done in Project or WBS Group properties dialog.

Layouts are assigned on Properties tab in control group Layouts. Layouts for WorkItem Dialog and WorkItem Pane are assigned independently. It is recommended to assign for WorkItem Pane a Layout containing less number of controls than the Layout for WorkItem Dialog.

Layout assignment to a Project or WBS Group is inherited by all sub WBS Items of it. By default all existing WBS Items use Predefined Layouts both for the WorkItem Dialog and WorkItem Pane. In order to change it you should open WBS Root Properties dialog and change the default Layout assignments to desired ones.

These are public Layouts only that could be assigned to a Project or a WBS Group.



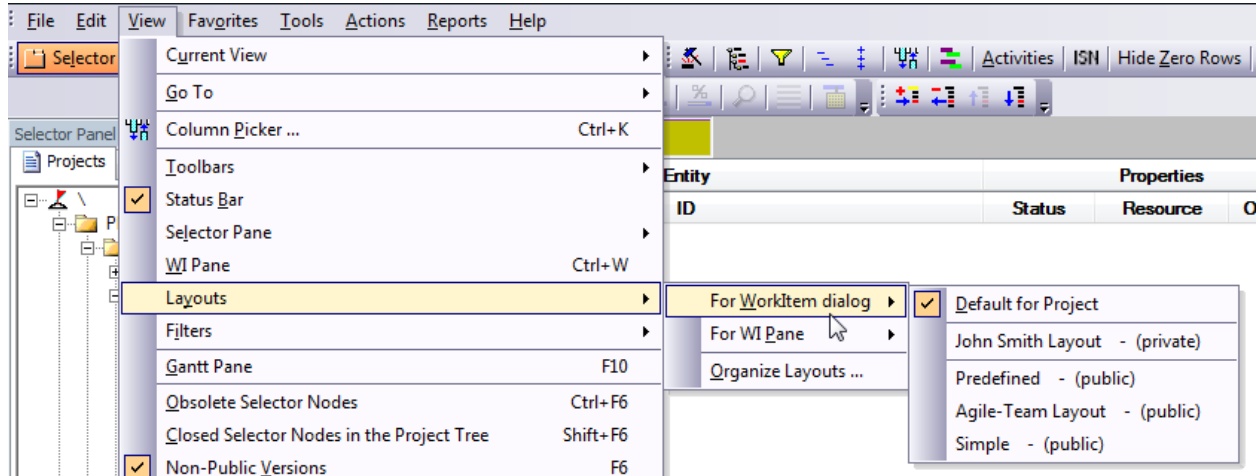
Using of Personal Layouts

It is allowed for each user to define which look should have WorkItem Dialog when opening or creating WorkItems. It is possible by the following menu items:

View -> Layouts -> For WorkItem Dialog

View -> Layouts -> For WorkItem Pane

The menu items allow assignment of a Layout for WorkItem Dialog and WorkItem Pane respectively.



It is allowed for the personal use to choose both public and private Layouts.

In order to drop a personal assignment of a Layout you should select Default for Project option.

Applying of Layouts

Layouts are automatically used on each opening of a WorkItem in WorkItem Dialog or WorkItem Pane and each time when WorkItem Dialog is started to create a WorkItem.

Choosing of the Layout to be allied depends on:

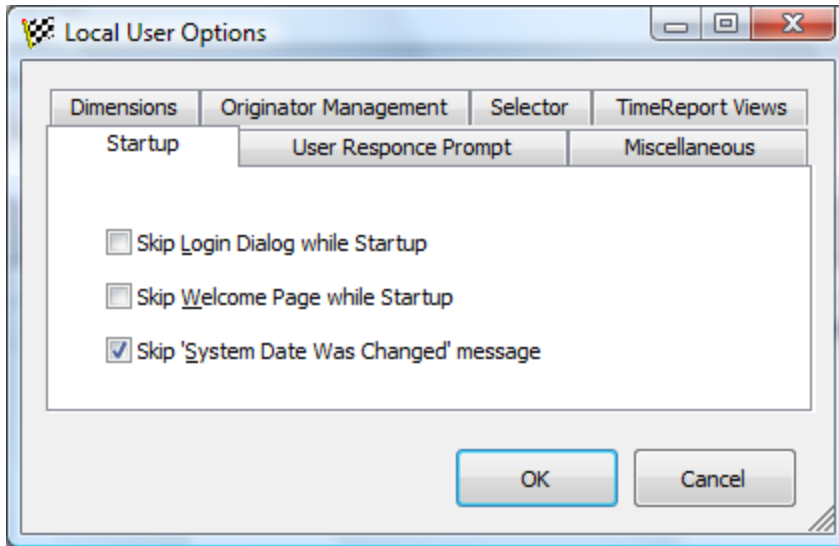
- The Layout assigned to Project or WBS Group that is parent to the opened WorkItem or to the parent WBS Item set in WorkItem Dialog when creating of a WorkItem.
- The Layout defined for personal use (when defined is always applied irrespectively of the inherited Layout).
- The Kind of the WorkItem.

If a Layout for the WorkItem Kind of a WorkItem is not found in the sets of assigned or inherited Layouts then the predefined Layout of the WorkItem Kind is used.

Local User Options

There are a lot of options that allow customizing the work with Agile-Team and specifying the workspace according to your needs and preferences. These options are individual for each User. In order to inspect or modify these options choose menu command **Tools/Local User Options**.

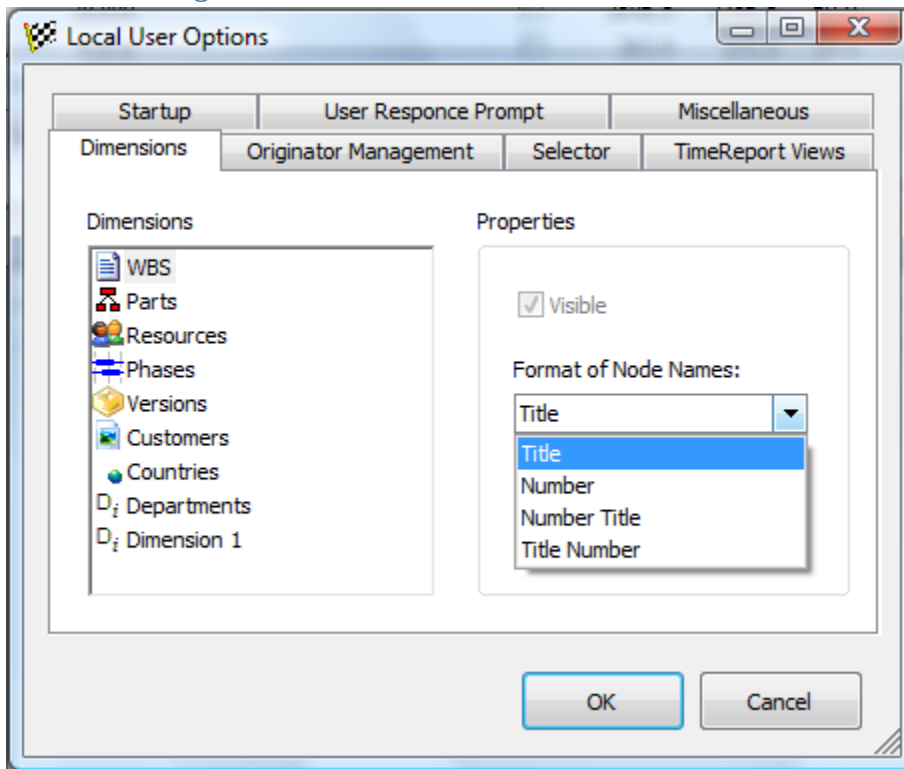
All available options are grouped at several tab pages of the following dialog:



Startup Page

Startup page determines whether to skip some dialogs and messages during Agile-Team startup. It is convenient to skip Login dialog if you are working with one and only Agile-Team database. Anyway, even if you set to skip Login dialog, you can show it at startup running Agile-Team with `/r` option. Agile-Team installer adds proper shortcut to the system Programs start menu.

Dimensions Page

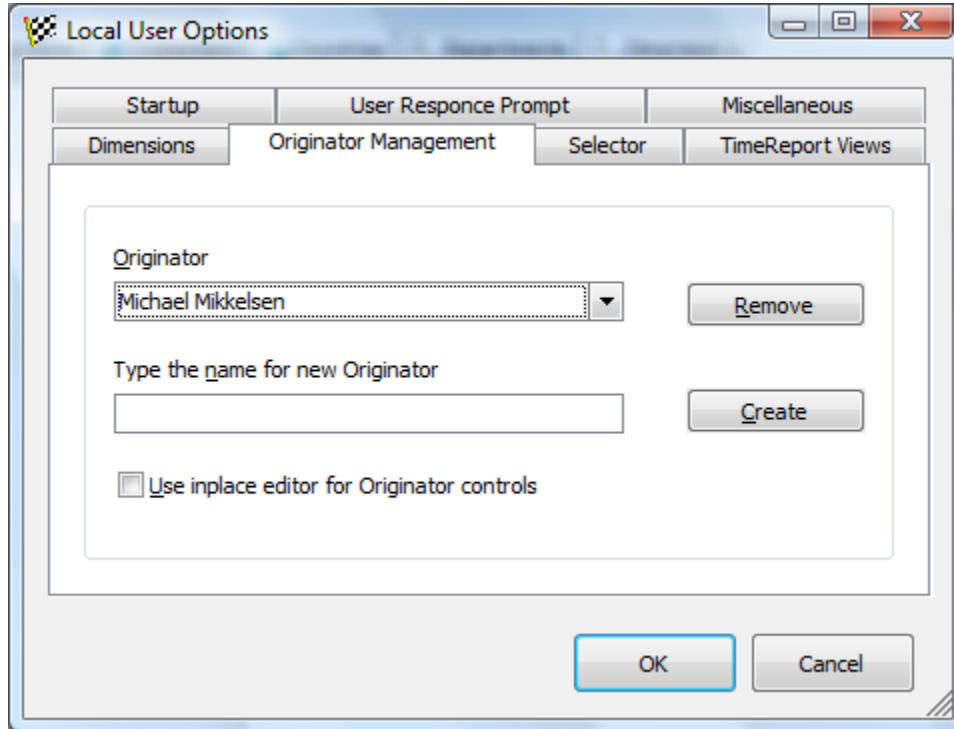


This page allows you to set the Visibility and Node Names Format for Dimensions.

For **WBS** and **Version** Dimensions it is possible to choose Node Names Formatting from: **Title**, **Number**, **Number Title**, **Title Number**.

Visible flag at this page doesn't mean that given Dimension is shown/hidden as a tree in the Selector (this can be ruled in the **Selector** page of this dialog), it means that given Dimension is visible (available) at all: the corresponded View exists for this Dimension and a column in the WorkItem Explorer View. You can change Visibility only for user-defined Dimensions.

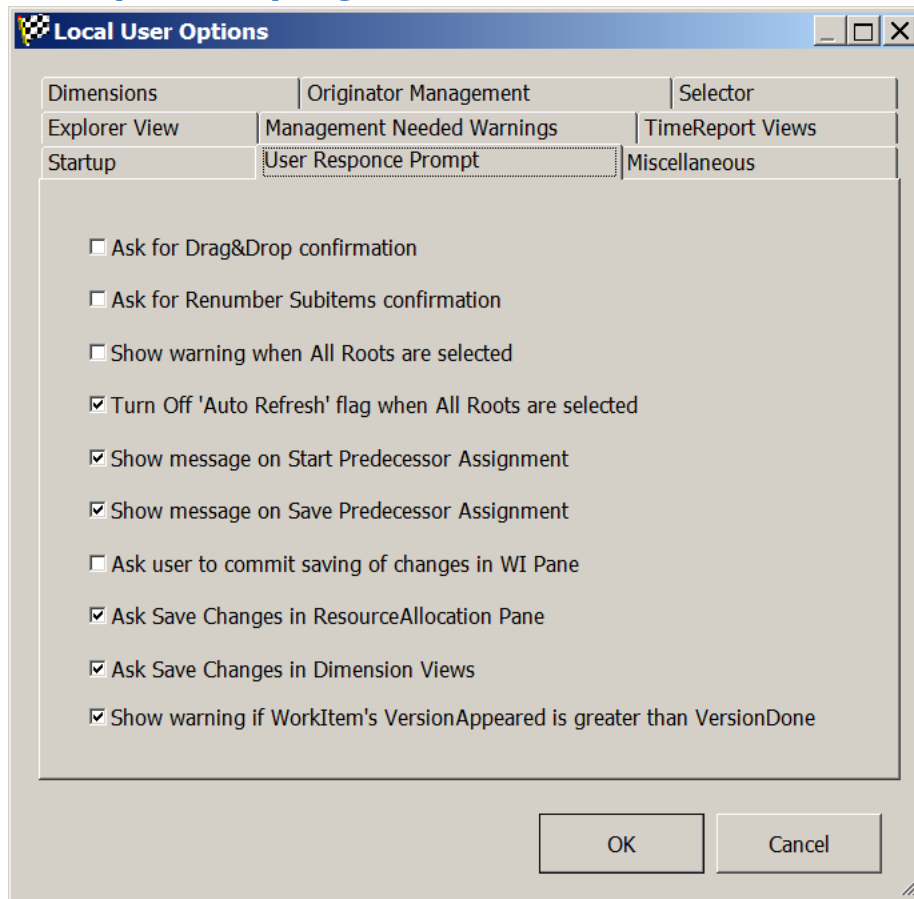
Originator Management Tab



Originators are people who originate WorkItems. For example, they can be persons who reported the Bugs, or Managers who set the Task. Originators can be both regular Resources and any other persons.

This dialog page allows inspecting the entire list of Originators, to **Remove** some of them or to **Create** a new one.

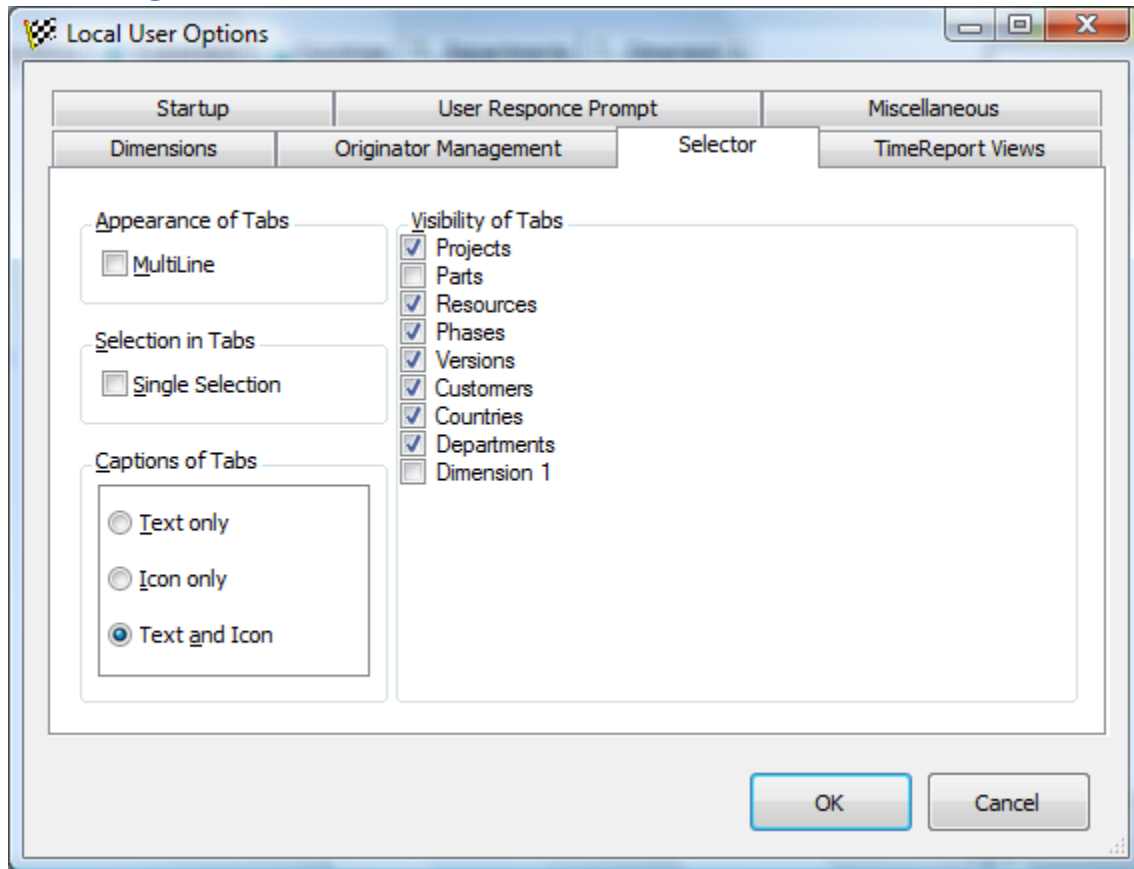
It is convenient to enter new Originator right in the WorkItem Dialog during the WorkItem creation. It is possible if the checkbox **“Use an in-place editor for Originator controls”** is turned ON.

User Response Prompt Page

Sometimes it is convenient to skip confirmation dialog, for example during long repeatable operation. Many confirmation dialogs in Agile-Team offer the choice **“Don’t ask me again”**.

If you want to get back the confirmation, just turn the proper checkbox ON at this dialog page.

Selector Page



Using this page you can set up the appearance and behavior of the Selector.

Appearance of Tabs

If you want to display Selector Tabs at multiply lines, then turn this checkbox ON.

Selection in Tabs

Usually the selection is the intersection of selected nodes in all Dimension Trees. If you turn checkbox “Single Selection” ON, Agile-Team will allow only one Dimension to have selected nodes. The selection for all other Dimensions will be dropped automatically.

Captions of Tabs

This radiobutton group allows to set the style of Tab Captions:

- Text only
- Icon only
- Text and Icon (default)

Visibility of Tabs

Using this group of checkboxes you can set the visibility of each Selector Tab. Individual tabs can be hidden using tab’s context menu. In order to get it visible back, you need use Local Options dialog, described here.

TimeReport Views Page

The screenshot shows the 'Local User Options' dialog box with the 'TimeReport Views' tab selected. The dialog has a title bar with a checkered icon and standard window controls. The tabs are: Startup, User Response Prompt, Miscellaneous, Dimensions, Originator Management, Selector, Explorer View, Management Needed Warnings, and TimeReport Views. The 'TimeReport Views' tab contains the following settings:

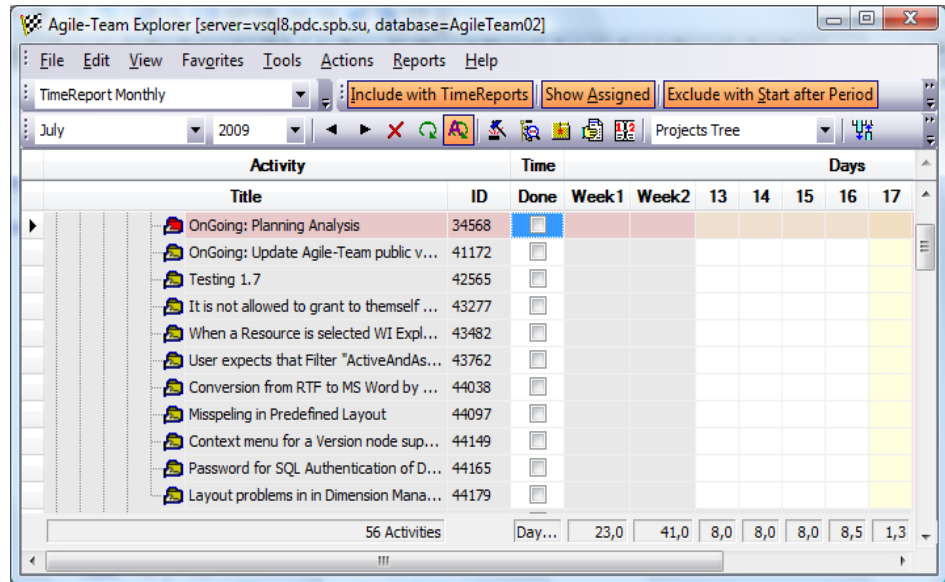
- Color Scheme for TimeReport Views:** Two radio buttons: 'Light input fields' (unselected) and 'Dark input fields' (selected).
- Days to look back for "Include Items with TimeReports":** A checkbox 'Without Limitation' is checked, and a text box shows '90'.
- Auto Save option:** A checkbox 'AutoSave' is unchecked, and a checkbox 'Delayed' is checked. A text box shows '6' followed by 'sec'.
- Action on Enter in Editor for Monthly View:** Three radio buttons: 'Stay in Cell, close Editor' (unselected), 'Move Right' (unselected), and 'Move Down' (selected).
- Ask for User Response and Confirmation:** Three checkboxes: 'Ask for "Save TimeReports" confirmation' (checked), 'Immediately ask Comments for TimeReports entered in Monthly View' (unchecked), and 'Show Message "only one active Activity" in Make Available dialog' (unchecked).
- Threshold for number of not saved TimeReports:** A checkbox 'Show Message when Threshold is reached' is unchecked, and a text box shows '6'.

At the bottom right are 'OK' and 'Cancel' buttons.

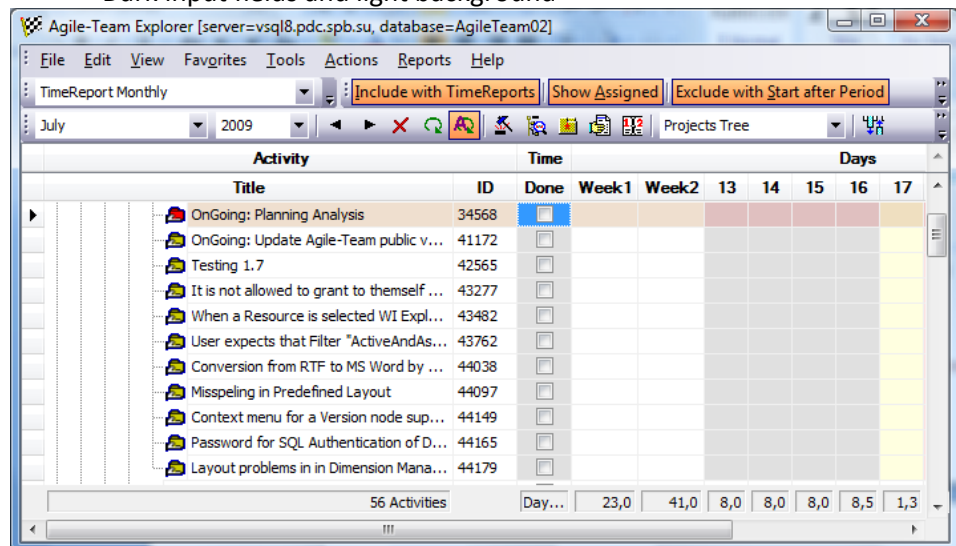
Using this page you can tune up the behavior of TimeReport Views.

**Color Scheme for
TimeReport Views**

There are two color schemes defined for TimeReport Views
-Light input fields and dark background



- Dark input fields and light background



Days to look back for “Include with Time Reports”

This option determines the depth of looking back for TimeReports made by Resource in the past.

Auto Save

If this checkbox is turned ON, then TimeReport values will be saved automatically when input focus leaves the cell. You can also define a delaying interval if you want “speedy” values entering and then autosaving for them all.

Action on Enter in Editor for Monthly View

You can choose from:

- Stay in cell, close Editor
- Move right
- Move down

Ask for User

These options allow you to skip some confirmation dialogs. The option “Don’t

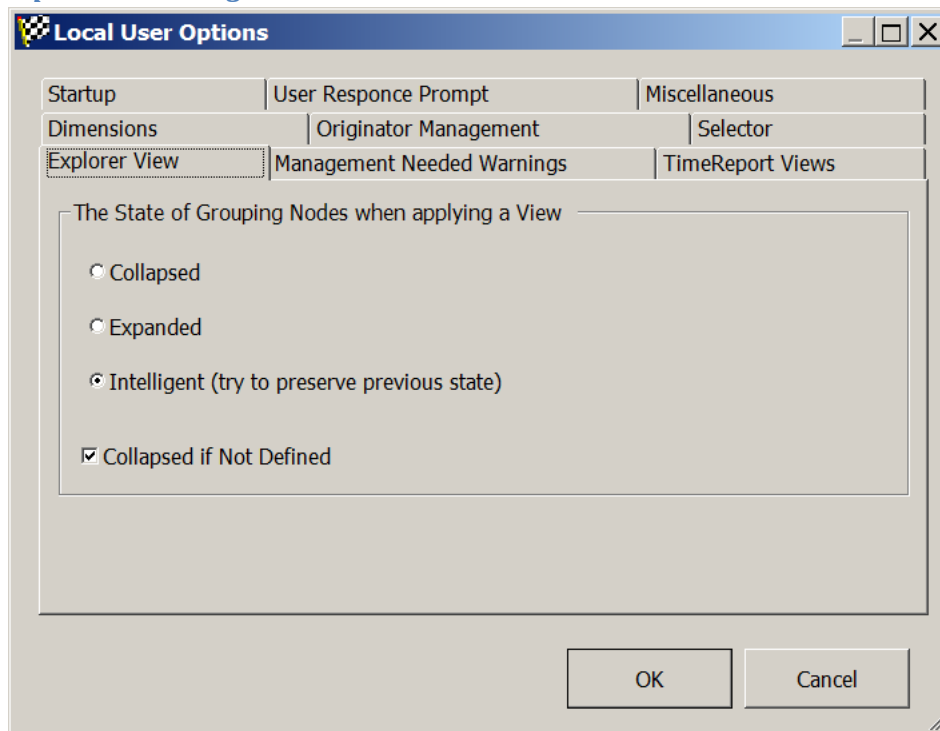
Response and Confirmation

ask me again” in these dialogs is used for the same purpose.

Threshold for number of not saved TimeReports

This option allows limiting the number of not saved Time Reports. When this value is reached, Agile-Team will bring the warning message.

Explorer View Page



Now it contains only one option: **The State of Grouping Nodes when applying a View.**

Collapsed and **Expanded** values speak by themselves.

Intelligent means “If a similar grouping node existed before applying a new View, then its previous collapsed/expanded state is preserved”.

For **Intelligent** choice there exists additional checkbox **Collapsed if Not Defined**. It controls the state of nodes whose state was not saved.

The default is **Expanded** and **Collapsed if Not Defined** not set.

Management Needed Warnings Page

Local User Options

Startup | User Response Prompt | Miscellaneous

Dimensions | Originator Management | Selector

Explorer View | **Management Needed Warnings** | TimeReport Views

☒ Visualize Management Needed Warnings in Explorer Row Indicator

☐ Visualize Management Needed Warnings in Gantt Pane

☒ Propagate Warnings to Parent

Select Issues for producing Management Needed Warnings:

Issue	Explorer	Gantt	Color
Estimate is changed	☒	☐	☒ Yellow ☐ Red
Status = Entered	☒	☐	☒ Yellow ☐ Red
Status = Analyzed	☒	☐	☒ Yellow ☐ Red
Status = Pending	☒	☐	☒ Yellow ☐ Red
UnPlanned Hours remain	☒	☒	☐ Yellow ☒ Red
Total Time is out of Budget	☐	☐	☒ Yellow ☐ Red
Finish exceeds LateFinish	☐	☒	☐ Yellow ☒ Red
Finish exceeds LateFinish of Ph...	☐	☒	☐ Yellow ☒ Red
Finish exceeds LateFinish of a ...	☐	☒	☐ Yellow ☒ Red

Reset to Default Settings

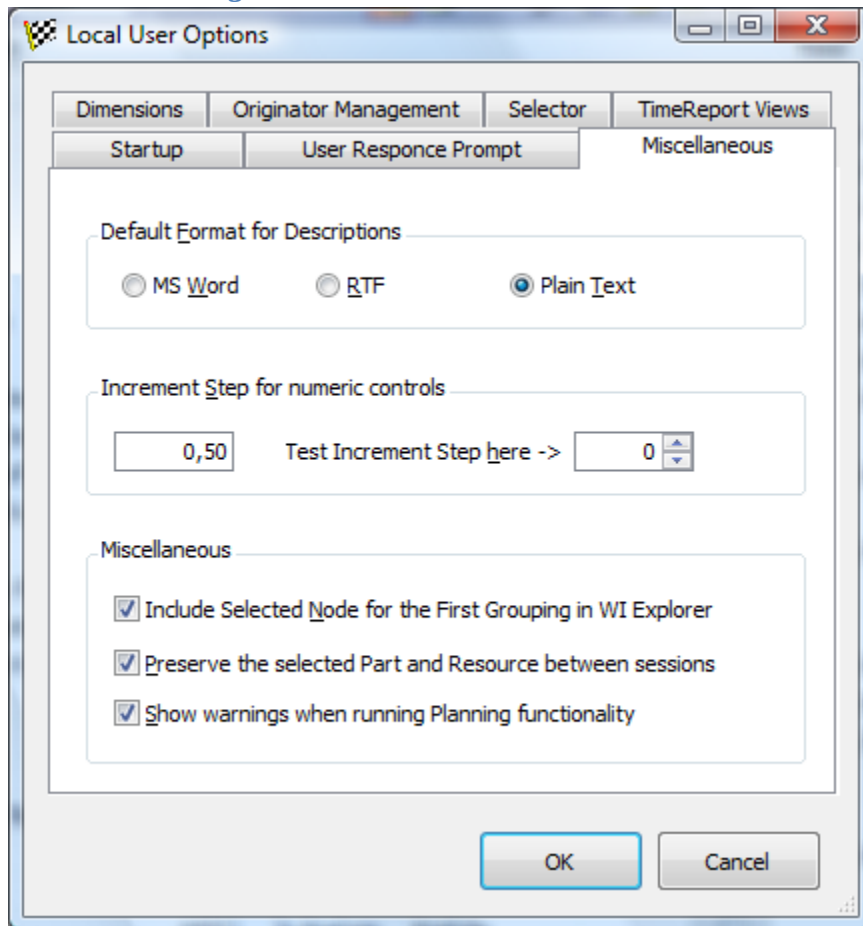
OK Cancel

See [Management Needed Column and Row Indicator](#) paragraph describing Management Needed functionality in detail.

Here you can state if you want to see Management Needed Warnings in Explorer and/or Gantt Pane at all. Also you can mark which Issues will produce Warnings and their severity – you can mark milder issues by Yellow color and more severe by Red color.

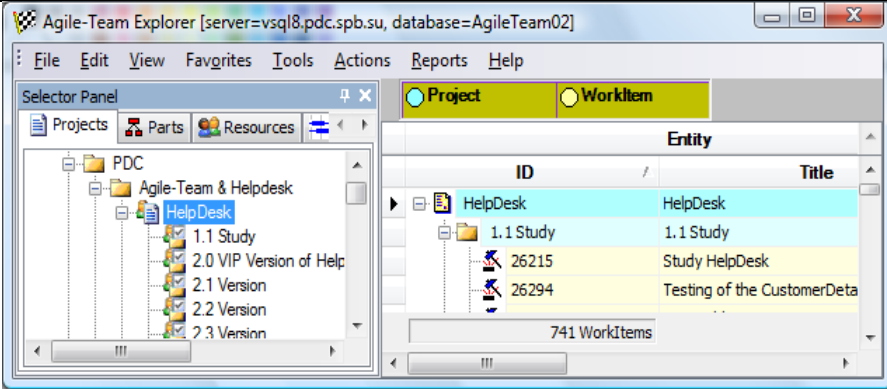
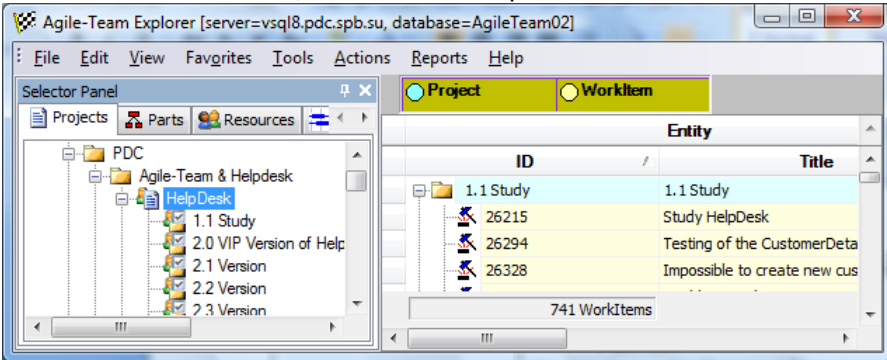
Checkbox "Propagate Warnings to Parent" states whether parent nodes will be marked as "with Warnings" when actually they are not, but their children are.

Miscellaneous Page



This page is used to set up various Agile-Team options

Default Format for Descriptions	Agile-Team supports three formats for Description fields: - Microsoft Word - RTF - Plain Text You can change the document format using Description toolbar also.
Increment Step for numeric controls	This field determines the increment step for numeric spin editors, like used for Used Time in WorkItem Dialog.
Include Selector Node for the First Grouping in WI Explorer	When this option is set, then Selector node will be include in WI Explorer as First Grouping node for the given Dimension. Look at the Project "Helpdesk" at the picture below.

	 When this option is turned OFF, then WI Explorer will start grouping from the first level child nodes, as shown at this picture: 
Preserve the selected Part and Resource between session	Agile-Team will remember Part and Resource if this option is turned ON.
Show warnings when running Planning functionality	If you want to omit all warnings from Planning subsystem, switch this option OFF.